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DocumentsCorePack Installation Guide for MS Dynamics 365 April 2023



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Preamble

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

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 DocumentsCorePack for Microsoft Dynamics 365 with the following basic skills:

- Basic Microsoft Dynamics 365 Knowledge
- 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 365
- Microsoft Dynamics CRM Online



1. How to install the DocumentsCorePack

You can install DocumentsCorePack on any supported operating system which is able to connect to your Dynamics 365 server. During the installation, you have to specify at least one organization where the DocumentsCorePack will be installed.

Additional organizations can be set up by the installation manager after the original setup has finished.

1.1. Prerequisites

Before you start the installation, you have to download the DocumentsCorePack Application. You can download files <u>here</u>.

1.2. Install directly on a Dynamics 365 On-Premise Server

When you want to use Dynamics 365, you can install DocumentsCorePack on every supported operating system. You must specify a valid Dynamics 365 profile. In this case, you have limited functionality of DocumentsCorePack. You cannot use the following features:

- SharePoint Folder and Site integration
- File Explorer integration



After the setup, you can start the DocumentsCorePack Configuration in the Windows Start menu to install and configure DocumentsCorePack in other Dynamics 365 organizations.



2. Installation of the DocumentsCorePack Server

This chapter explains how to install the Server component. It is important to ensure that the machine is online to the Dynamics 365 server.

2.1. Online Service Configuration

The setup allows users to configure DocumentsCorePack Document Generation for Microsoft Dynamics 365 Online without local installations. The service, as well as licensing, can be configured and maintained on our website.

Follow the links below for additional information:

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

2.2. Installation

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

Hit the **1** Next button to continue with the license agreement.





Figure 1: DocumentsCorePack installer for Dynamics 365



2.3. End User License Agreement (EULA)

Please accept the license agreement by checking the first checkbox and click on the **Next** button.

BocumentsCorePack Server for Dynam	nics 365			Х
License Agreement	4	mscrm-	addons	om
Please read the following license agreemen carefully.	nt 📢		ePack for Dynami	cs 365
FORM OF END USE	R LICENSE .	AGREEMENT		^
MSCRM-ADDONS.COM SOFT	WARE LIC	ENSE AGREE	MENT	
IMPORTANT: THIS SOFTWARE	LICENSE A	AGREEMENT ("LICENSE	
AGREEMENT") IS A LEGAL AGE	REEMENT B	ETWEEN CLIE	INT AND	
MSCRM-ADDONS.COM. READ 1	IT CAREFUI	LLY BEFORE U	SING THE	
SOFTWARE. IT PROVIDES A LI	CENSE TO	USE THE SOF	TWARE	
AND CONTAINS WARRANTY IN	FORMATIC	N, LIABILITY		~
I accept the terms in the license agreement	t		Print	
O I do not accept the terms in the license agr	eement			
InstallShield				
			1	1
	< Back	Next >	Cancel	

Figure 2: End User License Agreement (EULA)

2.4. Confirm the installation

If you want to change any of your installation settings, please hit the **1 Back** button or you can **2 Change** the installation folder as shown in the figure below. Click **3 Next** to proceed.



🛃 Docume	ntsCorePack Server for Dynamics 365		×
	on Folder t to install to this folder, or click Change to a different folder.	DocumentsCorePack	ons.com or Dynamics 365
	Install DocumentsCorePack Server for Dynan C:\Program Files (x86)\PTM EDV-Systeme GmbH\DocumentsCorePack Server for Micros	2	Change
InstallShield -	1 < Back	3 Next >	Cancel

Figure 3: Confirm with Install



If you want to review or change any of your installation settings, click **1** Back. Click **2** Cancel to exit the wizard and **3** Install to proceed.

BocumentsCorePack Server for Dynamics 365		×
Ready to Install the Program The wizard is ready to begin installation.	DocumentsCor	addons.com rePack for Dynamics 365
Click Install to begin the installation.		
If you want to review or change any of your installa the wizard.	tion settings, click Back. Clic	k Cancel to exit
InstallShield	ack Install	2 Cancel

Figure 4: Install the program

2.5. Install the 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.



Microsoft WIF PrerequisiteInstaller

Welcome to the WIF Prerequisite Installe	er. Detection finished
Identified OS: Windows 7 64-bit	
OS Architecture: 64 bit	
WIF Installation Status : NOT Installed	
	Install Cancel

Figure 5: Install Windows Identify Foundation



2.6. Configure Dynamics 365 Server

Next, you must configure your Dynamics 365 server. Select your **1** Existing Profile or create a new profile and select your **2** Dynamics 365 type. Choose the **3** Dynamics 365 Server-URL and add your login credentials by filling in the **4** Use default Credentials like username, password and domain fields. Click on the **5** Retrieve all button and as soon as the organizations are retrieved, choose the respective one and press the **6** OK button.

Logon information - DocumentsCorePack Server Based generation (2020.136)								
Welcome to you	ur Dynamics 365	Connection setu	.qı					
	nnection details to con your system administra	-	If you do not know the	connection				
Dynamics 365 Connectio	Advanced Settings Lo	g						
Existing Profiles 🚺			▼ Manage	New				
Select your Dynamics	365 Type 2							
C OnPremise	C IFD/Hosted	C Online	C AppAccess					
Dynamics 365 Server-L	Jrl:							
Copy your Dynami	ics 365 Url here			3				
Authenticated as:								
Use default Credent	ials Not enough informati	ion 4						
Username	Domair	n	Password					
		Retrieve all Organiza	5					
Organization informat	tion:							
Friendly name	Unique name S	erviceURL						
1			6					
			OK	Cancel				

Figure 6: Dynamics 365 Connection setup





If an old DocumentsCorePack version is detected during installation, you will be prompted to uninstall.

2.7. 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 being able to perform the license-check.

Product-specific security roles:

The 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



🛃 Docur	mentsCorePack Server for Dynamics	365			\times
	ng DocumentsCorePack rogram features you selected are being ed.		mscrm-a DocumentsCore		
15	unqfe 1aed000	d: Allow se	tup to changi	ng se 🗙	
	Setup is about to apply the follow mscrm-addons general security rol MSCRM-ADDONS.com AutoMerge DocumentsCorePack Security Role If you want to skip this step, pleas ATTENTION : Bypassing this step re the roles to all users or to include the required rights in	e e press No. equires you to e	ither manually	-	
InstallShie			Yes	No	
		< Back	Next >	Canc	el

Figure 7: Security roles

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



If you skip this step, you will be required 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 system, the following window will appear. Confirm with **Yes** to allow the DocumentsCorePack Server setup to use SharePoint. Click **No** to skip this step.

🛃 Docume	nentsCorePack Server for Dynamics 365 —	\times
Installing	g DocumentsCorePack mscrm-addor	ns.com
The pro installed	ogram features you selected are being ed.	ynamics 365
1 6	Please wait while the InstallShield Wizard installs DocumentsCorePack Server for Dynamics 365. This may take several minutes.	
	DocumentsCorePack Server Setup - Prerequisites installer ×	
	DocumentsCorePack has detected a default Sharepoint configuration in your Dynamics 365. Should DocumentsCorePack try to use this configuration?	
	Yes No	
InstallShield		
	< Back Next > Ca	ancel

Figure 8: Default SharePoint configuration detected



2.8. Finish the installation

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



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



Figure 9: Finish installation



2.9. Organization overview

After finishing the configuration, the **Organization overview** window opens. With a click on the configuration, you have the option to edit the service.



To open the **Organization overview** again, after closing, search in the Windows Start pane **Configuration – DocumentsCorePack for Dynamics 365**.

🐌 View Organization Ir	nstallation States - Docum	nentsCorePa	ck 2020.136			- 🗆 X
Organization o Please select an orga configuration or licer	nization in the list to	access org	anization specific functionalities, lik	e	Documents Co	-addons.com orePack for Dynamics 365
			Availabl	e Organizations:		· · · · · · · · · · · · · · · · · · ·
Friendly name	Unique name unq	1aed	Installation State DocumentsCorePack is INSTALLED	BuildNr. 2020.136	AutoMergeGlobalButton 2020.196	DocumentsCorePack by m 2020.136
<						2
Get IFD Setup						Close

Figure 10: Organization overview



2.10. Organization overview – Function buttons

After choosing an organization in the Organization overview window, the several function buttons will appear at the bottom of the window.

View Organization Ir	stallation States - DocumentsC	orePack 2020.136		— C) X
Organization o Please select an orga configuration or licer	nization in the list to acces	s organization specific functionalities	, like	mscrm-addons. DocumentsCorePack for Dynamic	COM mics 365
		Ava	ilable Organizations:		`
Friendly name	Unique name	Installation State	BuildNr.	DocumentsCorePack by mscrm-addons.com	Docum
CRM168820	unqfe9a36ddb2d3ed11a	aed DocumentsCorePack is INSTALLED	2020.136	2020.136	2020.2
< <u>1</u>	2 3	4 5			
Reinstall/Upgrade Li	enseManager Uninstall	Get IFD Setup Configurations			lose

Figure 11: Organization over - function buttons

1 Reinstall/Upgrade: Upgrade your solution to the latest version.

2 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 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 documentation (chapter 2.1 Local License Manager Overview).

3 Uninstall: With a click on this button, you have the option to uninstall DocumentsCorePack from the selected organization. Before it is uninstalled, you will be provided with the Uninstall window. Here, click on the **Yes** button to uninstall the service or click on the **No** button to cancel.

4 An **IFD setup** is only required when using FileExplorer or SharePoint Folder and Sites Integration. Therefore, you must install IFD before you can use it via this button.

5 Configurations: This button allows you to configure the **1** DocumentsCorePack Template Designer & Dynamics 365 generation settings and to set up the **2** Service Configuration in Dynamics 365 and print jobs.



2.11. Client & Server Based generation settings

Hit the **Launch** button to open the settings for **DocumentsCorePack Template Designer** and/or **Dynamics 365 Document Generation**. The window that opens provides you with a few tabs to help you configure your Client and Server Based Generation settings. Here, users can configure which entities the Server and/or Client Based button should appear for and rename the button label. (For example, configure which entities you want to see for the **Export** button).

Please Note:

Client = DocumentsCorePack Template Designer Server Based = DocumentsCorePack

Configurations -	Close	
Client & Server Based generation setting Configure Client & Server Based document generation s		Launch
Enable debugging (Caution! Slow)		
Service Configuration Set up a service for Server Based Document Generation print jobs	in Dynamics 365-	Launch Online and
Figure 12: Configurations		



2.12. The Command bar tab

The options in the **CommandBar** tab help you to configure the CommandBar button visibility and the formatting for DocumentsCorePack and DocumentsCorePack Template Designer Document Generation.

Here users can configure the entities where you want them to show, as well as display the name of these buttons:

- The **Export To Word** button for the DocumentsCorePack Template Designer Document Generation
- The **Create Document** button for the DocumentsCorePack Document Generation

DocumentsCorePack Server Config v2020.136 // unqfe9a36ddb2d3ed11aed0000d3a64d @ https:/ — — X CommandBar General Settings SharePoint Advanced X Use these options to configure commandbar button visibility and formatting for the Server Based and Client Based Document Generation X					
Client Based Document Generation Server Based Document Generation (Trial) Button label Export to Word Details Advanced Template Group Filtering Server Based Document Generation (Trial)					
CommandBar Configuration			┥		
Entity Name	Have Client Based Button (select all)	Have Server Based Button (select all)	^		
AAD User					
Account			1		
Account Project Price List					
Action Call					
Action Call Workflow					
Action Card					
Action Card Regarding					
Action Card Role Setting					
Activity File Attachment					
Actual					
Actual Data Export (Deprecated)					
Adaptive Card Configuration					
Address					
AddToCalendar style			\downarrow		
		OK Canc	el		



2.12.1. DocumentsCorePack Template Designer (Client Based) document generation

This section contains all settings for DocumentsCorePack Template Designer Document Generation. With a click on **Export to Word**, you can define a different name for the **Button label**.

Client Based Document Generation			
Button label Export to Word	Details		
Advanced Template Group Filter	ring		

Figure 13: Client Based Document Generation

With a click on **Details**, the **Edit Ribbon & Navigationbar resources** window opens.

The editor allows you to modify the default ribbon and navigation bar icons and labels supplied by DocumentsCorePack server.



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.

1 Icons: The Icons tab of this configuration window gives you the possibility to change the icons of the buttons. The icons are Dynamics 365 web resources, which you can upload yourself with the standard Dynamics 365 functionality.



Edit Ribbon & Navigationbar ressources

	V 🖉 Default
nce_Complete.png olor.png n_LeadScore_Loading_16.gif AsComplete_16.png ew.png .png 1.png	
_smile.png bscribe.png bs_down.png I Article .png ce/_imgs/ribbon/Attachment_32.png	
	RM-ADDONS.com ptm_dcp_icon_exportword16x16 RM-ADDONS.com ptm_dcp_icon_exportword16x16 ence_Complete.png iolor.png /n_LeadScore_Loading_16.gif AsComplete_16.png lew.png s.png tl.png SoEfaultConfiguration_32 _smile.png ibscribe.png ibs_down.png l Article s.png cce/_imgs/ribbon/Attachment_32.png ore.png .png iew.png Common/_imgs/Ribbon/EmailToCaseOfQueue_32.png cce/_imgs/ribbon/ReactivateCase 16.png

Figure 14: Ribbon and Navigation bar resources

2 Labels: Within this dialog you can set the different labels for the different locations (Grid, Form...) of the **Export to Word** button for different languages.

Edit Ri	ibbon & Nav	vigationbar ressource	5	
This e Docu	editor allow mentsCore e. Us	vs you to modify t Pack server. Pleas	& 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 a each control to reload the list of available resources	ble
			Create Document - SubGrid	^
	LCID	Language	Label	
•	1033	English (United	Export to Word	
			Create Document - Grid	-
	LCID	Language	label	-
	1033	English (United	Export to Word	
			Create Document - Form	
	LCID	Language	Label	
•	1033	English (United	Export to Word	
	_		Create Document - SubGrid in Outlook	
	LCID	Language	Label	
•	1033	English (United	Export to Word	
			Create Document - Grid in Outlook	~
			Clos	e

Figure 15: Labels tab



Advanced Template Group Filtering: This feature offers the option to set a filter for DocumentsCorePack templates.

Advanced template filtering	_		\times	
Welcome to the advanced group filtering for templates With this form, you can link attributes of specififc entities to the group field of the DCP templates entity				
Click here for Blog article				
Click here for Blog article	Template Group Filter Field			
	ОК	Cance	el	

Figure 16: Advanced template filtering



While saving the changes, the following window will appear. Click **OK** to continue saving. **IMPORTANT**: DO NOT KILL the process when it freezes. This could cause inconsistent data in Dynamics 365. You have to wait until the configuration is finished. Click **Cancel** to save a later time.

DocumentsCorePack Server for Dynamics 365	×	
Are you sure you want to save all settings now? Depending on the selected configuration and server performance it could take up to an hour to complete. Also the Dynamics 365 server will respond very slowly during the save process. It is strongly recommended to save the configuration outside the business hours.		
- Press "OK" to continue saving - IMPORTANT: DO NOT KILL the process when it freezes. This could cause inconsistent data in Dynamics 365. You have to wait until the configuration is finished - Press "Cancel" to save a later time		
OK Cancel		

Figure 178: Save settings



2.12.2. Server Based document generation

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

All our addons come with a 14-days trial license. If the trial license is expired, the window will look like in the screenshot shown above. Please contact our support team to get the permanent license for DocumentsCorePack and / or DocumentsCorePack Template Designer Document Generation & Processing should this occur.

Server Based Document Generation (Trial)			
Button label Crea	ate Document	Details	

Figure 18: Server Based Document Generation (Trial)



2.12.3. Command bar Configuration

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

1 Activating the checkboxes will select the **DocumentsCorePack Template Designer Document** Generation Button **Export to Word** for the selected entity.

2 Activating the checkboxes will select the **DocumentsCorePack Designer Document** Generation Button **Create Document** for the selected entity.

Entity Name	Have Client Based Button (select all)	Have Server Based Button (select all)	
wkwconfig			
Work Order	\checkmark		
Work Order Business Process	\checkmark	\checkmark	
Work Order Characteristic (Deprecated)			
Work Order Details Generation Queue (Deprecated)	\checkmark		
Work Order Incident			
Work Order Product	\checkmark		
Work Order Resolution			
Work Order Service			
Work Order Service Task			
Work Order Substatus			
Work Order Type			
Work Stream			
Work template			

Figure 19: Command bar configuration

2.13. The General Setting tab

1 Import/Export Templates: For more information about the import/export of DCP templates, please have a look at chapter <u>6.2 Import/export existing</u> <u>DocumentsCorePack templates</u>.

2 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 <u>7 Language Settings for DocumentsCorePack</u>.



3 Debug: Please leave this option unchecked. It is used by our support for bug fixing.

4 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 Template Designer.

5 Names to Cut: This functionality is depreciated.

6 Replace Special Characters: Treats special exceptions or certain coding problems with Dynamics 365.

7 Additional Entities: DocumentsCorePack only shows customizable entities by default. If you want to use other entities for DocumentsCorePack, you must define them here.

8 **Entities don't show**: Entities that are registered here will be hidden and are not useable/visible within DocumentsCorePack.

9 **Unavailable entities**: Entities which are not included in the metadata cache.

(1) Folder Displayattribute: Here you can define the attribute for each entity that should be used for the folder name (affects SharePoint AND File Explorer). You can ignore this setting if you don't save your documents in one of these locations. Per default the "name" attribute is used.

1 Metadata Cache (Not Created): Create your metadata and save it to a local location. This is the fasted way to download metadata to the DocumentsCorePack Template Designer.

Please note: once created, this functionality needs to be updated manually!

(2) Server Based Document Generation Settings: With a click on this button, users will access the "AutoMerge Config" in DocumentsCorePack to set up a service for Server Based Document Generation in Dynamics 365 and print jobs. For detailed information, please read <u>chapter 2.5 Service Configuration</u>.



Import DCP Templ	atar Evport All Tamplatar
Import DCP Tempi	ates Export All Templates
2 Language	en 🗸
3 Debug	
4 Datasource:	user-dependent \sim
5 Names to cut	parentcustomerid-pc1,parentaccountid- pa1,nationnameid-nn1
6 Replace Special Characte	rs ,– -, &##v000D+1</td></tr><tr><td>7 Additional Entities</td><td>pricelevel, territory</td></tr><tr><td>8 Entities don't show</td><td>invoicedetail, quotedetail, opportunity</td></tr><tr><td>Unavailable Entities</td><td>accountleads, annualfiscal calendar, ap plication file, asyncoperation, attachme</td></tr><tr><td>10 Folder Displayattribute -</td><td></td></tr><tr><td>Here you can define th entity which should be</td><td></td></tr><tr><td>foldername (affects bo File Explorer). You coul setting when you don' documents in one of tl default the "name" attr</td><td>d ignore this Configure for entitites t save your his locations. Per</td></tr><tr><td>11 Metadata Cache (Not cre</td><td>ated) : Create</td></tr><tr><td>12 Server B</td><td>ased Document Generation Settings</td></tr></tbody></table>

Figure 20: General Settings tab



2.14. The Sharepoint tab

Here, you have the option 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 and in MS CRM 2015. The DocumentsCorePack Template Designer supports both SharePoint Integrations



To use the SharePoint integration, you must configure it within Dynamics 365. When enabled, the documents generated via the DocumentsCorePack Template Designer will be saved in the Dynamics 365 specified SharePoint location for each record.



	Pack Server Config v2020.136 // unc General Settings SharePoint Advan			:/ —		
	Save Documents in SharePoint	1				
	CRM Integrated Sav	/e in Folders 🔵 Sav	ve in Sites			
				0		
	SharePoint Server			_		
	Use HTTPS		Configure Certificat	e		
	Root Site					
	Template		\sim	0		
	Document Library Name					
	Entity Specific Sites	Config	ure			
	Entity Relation Sites	Config	ure			
	Entity Site Name	Config	ure			
	Use Unique Permissions					
	Activity Settings					
	Here you can configure where you want to see the		Configure Entities			
	created documents for an entity	I	Use other aspx-site			
	entity					
	SharePoint Documents NavBar N	ame SharePoin	t Documents			
_						
· •				OK	Canc	el



2.15. Service Configuration

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

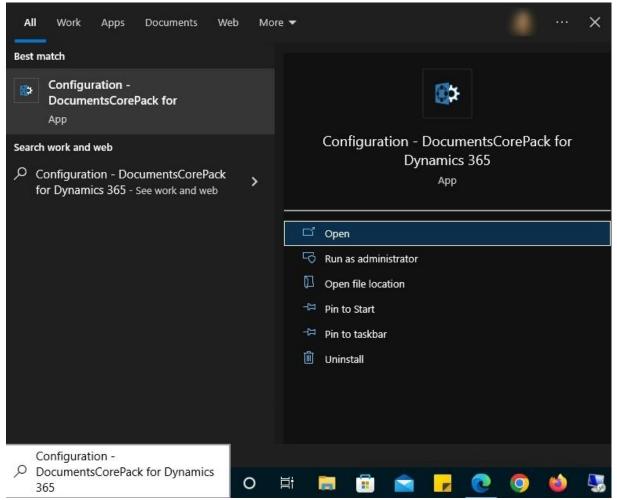


Figure 22: Look for DCP Configuration in task pane

2.15.1 The General tab

Within the **1** General tab, define a **2** ServiceName to add a new service, and click on **3** Verify to Add a New Service. You can see your new created Service in the **4** Inactive Services section. Also, there are several additional settings:

To use a printer, you can configure in the **5** Service Logon –[ConnectionSetup / **PrinterConfiguration**]-section a Service User.

The **6** General section offers the following options:

If you **7** Activate Debugging, a default **8** Logfile path is created in a temp folder.



Please note: If you want to specify your own log file path, keep in mind that each load balancing service needs its own path.

Select here your **9 Batch Size** and **10 Batch delay**. It is recommended to set the batch delay to 10 seconds and decide which types of jobs should this service work on (only print jobs, only document generation jobs or both).

Also, you can select **11** Always restart on failure or **12** Enable SharePoint REST API.

Don't forget to **1**³ **Save** your **service configuration**. To activate the service, just press **4 Start Service** button. You can see your service running in the Active Services section.

DocumentsCorePack Server - Management (v. 2020.149)		– 🗆 X
Welcome to the DocumentsCorePack See This tool will help you create and manage your merge		mscrm-addons.com DocumentsCorePack for Dynamics 365
Add New Service	Dynamics 365 Connection Setup License Log Printer	
New service setup	same ServiceName: DCPService1 (Once set, the servicename cannot be changed again)	Verify 3
5 Service L	.ogon - [ConnectionSetup / PrinterConfigurations]	
Inactive Services 4	O local system account	
DCPService1	O custom account Service User:	Validate
	Password:	
6 General 8 9 10 Stop S	•- • •- • _	PU load PU load Save service configuration
DCPService1: Configuration Saved	•	Close .::j

Figure 23: General tab

2.15.2. The Dynamics 365 Connection Setup tab

Again, you must specify your Dynamics 365 connection in the **1** Dynamics 365 Connection Setup tab. Click on the Save service configuration to continue.



Switch to the connection tab and select the **2 Dynamics 365 Type** (OnPremise), enter the **3 Dynamics 365 Server-Url** and your credentials to **4 Retrieve all Organizations**.

In the **5** Organization information section, your organization is displayed. Confirm with **6** OK.

🚯 DocumentsCorePack Server - Manager	nent (v. 2020.149)	– 🗆 X
Welcome to the Document This tool will help you create and man	sCorePack Service Overview lage your merge services	Crm-addons.com
Add New Service	General Dynamics 365 Connection Setup 2 Select your Dynamics 365 Type • OnPremise IFD/Hosted Online AppAccess	
Active Services	Dynamics 365 Server-Urt:	
Inactive Services	https://	*
	Authenticated as: Use default Credentials Not enough information Username Domain Password Organization information: Friendly name Unique name ServiceURL)
	Advanced Options	6 OK Cancel Enable Teammembers
	Stop Service Start Service Delete	Save service configuration
DCPLoadBalancing: Service unregistered		Close

Figure 24: Dynamics 365 Connection Setup

2.15.3. The License tab

In the License tab, you can view the information about your license. In the example below, the license is valid.



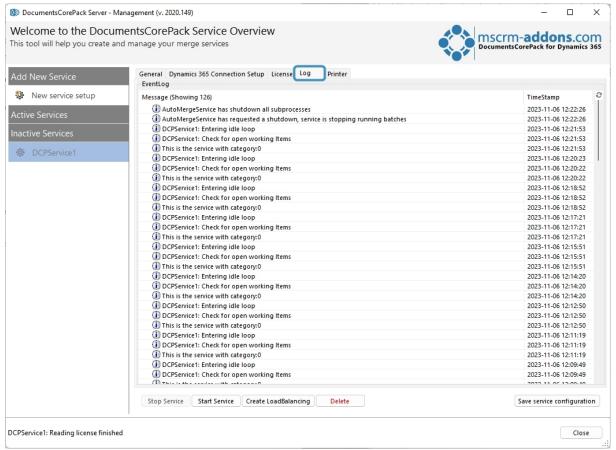
DocumentsCorePack Server - N	1anagement (v. 2020.149)				– o ×		
Welcome to the Docur This tool will help you create an				DocumentsCore	addons.com ePack for Dynamics 365		
Add New Service	General Dynamics 365 Cor	nection Setup License Log	Printer				
🕸 New service setup	Your license is Valid	Your license is Valid					
Active Services	General license information (CRM 9.2.23094.220)						
Inactive Services		Licensevalue		Systemvalue	Status		
Indelive Services	Licensemodel	perSite			0		
DCPService1	Licensekey	/8MA1WmlYq3h/TrJjQM8lLIB	Licensekey installed		0		
	BusinessUnit	unqd9d7301fca63ee11a382	unqd9d7301fca63ee11a382002248282				
	Number of site licenses	12	1		*		
	Licenses for Readonly Users	0	0		*		
	Expiration	2/12/2024 12:00:00 AM	98 days left		*		
	Support	2/12/2024 12:00:00 AM	98 days left		¥		
	Issued product	DocumentsCorePack Server	DocumentsCorePack Server Based generation		*		
	Version upgrade covered	2/12/2024 12:00:00 AM	10/30/2023 10:26:46 AM		*		
	License Status						
	LicenseState		valid		*		
	Stop Service Start Ser	vice Create LoadBalancing	Delete Licensing	Sat	ve service configuration		
DCPService1: Reading license finishe	ed				Close		



2.15.4. The Log tab

See here the latest events and changes.







2.15.5. The Printer tab

DocumentsCorePack now offers a service-based printing option, which is available in addition 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 that runs in the background. Learn more.



🚯 DocumentsCorePack Server - Manag	gement (v. 2020.149)	_	
Welcome to the Documer This tool will help you create and m	ntsCorePack Service Overview nanage your merge services	ddo Pack for	Dynamics 365
Add New Service	General Dynamics 365 Connection Setup License Log Printer		
New service setup	Saved PrinterConfigurations	Manag	
Active Services	ConfigurationName	4	New
Inactive Services		-	Edit
DCPService1		4	Сору
NM DCPService I			
		*	Delete
	Stop Service Start Service Create LoadBalancing Delete Save	e service (configuration
DCPService1: Reading license finished			Close

Figure 27: Printer tab

2.15.6 Create a Load Balancing service

Load Balancing plays a crucial role in ensuring the scalability, availability, and performance of DocumentsCorePack services. Learn more about the impact of Load Balancing <u>here</u>.

Please note: LoadBalancing requires a license that can be optionally added to your subscription. Please contact <u>sales@mscrm-addons.com</u> for details.

After following the steps to create a service for DocumentsCorePack (on premise), click on the **1** Create LoadBalancing button.

Please note: **2** When your service is active, you have to stop it in order to create a Load Balancing service.



DocumentsCorePack Server - Management (v. 2020.	49)	– 🗆 X
Welcome to the DocumentsCorePac This tool will help you create and manage your m		mscrm-addons.com DocumentsCorePack for Dynamics 365
	neral Dynamics 365 Connection Setup License Log Printer	
New service setup Active Services	ServiceName: DCPService1 Verify (Once set, the servicename cannot be changed again)	
Inactive Services 2	rvice Logon - [ConnectionSetup / PrinterConfigurations] O local system account C custom account Password: Validat	
	Logfile Path: Other: Activate Debugging Batch Size: 25 Count of service runs, before entering idle loop to limit CPU load Batch delay: 90 Idle loop time in seconds Category: 0 Other: Idle loop time in seconds Vhich type of Jobs should this service work on? O hoth Only print jobs Filter: Only document generation jobs Always restart service on failure Enable Sharepoint REST API Consent	Save service configuration
DCPService1: Service stopped		Close

Figure 28: Create LoadBalancing service for DCP on premise

This window opens. Now define how many Load Balancer you would like to configure and how many services should be reserved for single documents only. Confirm with **OK**.

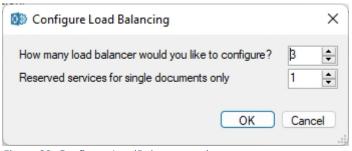


Figure 29: Configure LoadBalancer services

This dialog appears to confirm your changes, click **YES**.



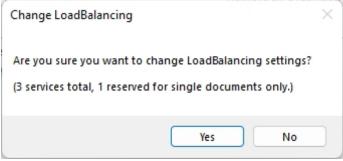


Figure 30: Confirm changes

A **1** DocumentsCorePack Load Balancing service with **3** subservices is created. Don't forget to **3** Save service configuration and Start the Service.

DocumentsCorePack Server - Management (v	. 2020.149)	– 🗆 X
Welcome to the DocumentsCor This tool will help you create and manage y		mscrm-addons.com DocumentsCorePack for Dynamics 365
Add New Service	General Dynamics 365 Connection Setup License Log Printer	
New service setup Active Services		Verify
Inactive Services	Service Logon - [ConnectionSetup / PrinterConfigurations] I coal system account C custom account Service User: Password: V	alidate
・・	General Logfile Path: Other: Activate Debugging Batch Size: 25 Batch delay: 90 Idle loop time in seconds Category: 990301 Which type of jobs should this service work on? b both only print jobs Filter: only document generation jobs Always restart service on failure Enable Sharepoint REST API Conset Stop Service Start Service Configure LoadBalancing Remove LoadBalancing	ad
ldle	•	Close .:;

Figure 31: Load Balancing service & subservices

Please note:

- When starting the load balancing service, the subservices automatically start too.
- If you activate debugging, a Logfile path is created automatically. But if you want to specify your own path, keep in mind that each load balancing service needs its own path.



2.16. Licensing

Learn in this guide all about licensing for Microsoft Dynamics 365.

2.17. Upgrade

To upgrade your DocumentsCorePack version, simply re-run the setup (find the newest version <u>here</u>).

The final step of the upgrade is to execute the DocumentsCorePack Configuration as shown in chapter <u>2.11. Client & Server Based generation settings</u>. The configuration is necessary to upgrade DocumentsCorePack properly!



3. How to install DocumentsCorePack 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 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" Download.

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



A step-by-step description for a Basic installation/configuration of our addon

Please note: There is no IFD Configuration required for DocumentsCorePack for MS CRM 2015 Installation.

Step 1: Install the addon on the Dynamics 365 Server.

Step 2: You will be asked for the login 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 **OK**.

Create CRM connection profile	×
You have to specify a valid CRM connection profile. The user with which you're connection	ing must be in the system administrator role to set up a service.
1 This CRM connection profile is currently in use by a Service Configuration. You're only a	able to change the user credentials. You also have to select the same organization.
Select your connection type	Server2Server App Access App Access (custom) IFD (hosted)
CRM URL	
Credentials - You need to specify administrative user credentials	
Username	Password Your CRM password
Retrieve Organizations	
	Verify Connection & Save Profile



Step 3: After the installation is finished, you must open the IIS (inetmgr.exe) and go to Sites \rightarrow the Addon Website. Right click the DocumentsCorePackserver - WebSite and select **Edit Bindings...**.

e j	Internet Inform	ation Servi	ces (IIS) Mar	nager		
CRM201	3SRV1 Sites					
File View Help						
Connections					Act	ions
🔍 • 🗟 🖄 🥵	Sites					Add W
Start Page	Filter	• 🐨 Go	- 🕁 Show A		-	Set We
Groupe Microse A		D 5	Status Started (ht Started (ht Started (ht Started (ht	Binc *:55: *:80 *:55: *:55: :555	0	Help Online
	ename witch to Content View	-				

Step 4: On the bindings click on **Add...** and select **https** in the **Add Site Binding**. You also must specify the port. In our example we use 4446. Now the web site is available for https. Click on the **OK** button.

			Site	Sindings	? >
Type http	Host Name	Port 5556	IP Address	Binding Informa	Add
			Add Sit	e Binding	7 ×
	Туре:	IP a	eddress:	Port	e
	http	¥ AI	Unassigned	v 4446	
	Host name:				
	Example: www.	contoso.co	m or marketing.co	ntoso.com	
_					
				OK	Cancel

Step 5: Reselect the addon website and double click on the "Authentication" item in the details pane on the right-side. Verify that the "Anonymous" and "ASP.Net Impersonation" settings are enabled.



Step 6: The addon URL needs to be added to your DNS Server. Your DNS-servers must resolve the **documentscorepackserver.[your-domain]** names correctly. That means that they should resolve it with the same IP address as your Dynamics 365 Server. If you have an external DNS, make sure that both the external and the internal DNS can resolve the URL.

Step 7: Extract the IFD-Tool (zip-file) that you downloaded before and execute the **IFDSetupWizard.exe**. Follow the steps in the IFD Setup carefully.

Step 8: Open your Dynamics 365 and go to "Settings" and then "MSCRMADDONS.com Products". Open the addon in the MSCRM-ADDONS.com products section, and then select the MSCRM-ADDONS.com Settingskeys and search for the "WebApplicationPort" entry.

Dy	/nami	cs 36	5 Settings	~	Products	> (GroupCale	endar >								
w Al	erts (8)	Latest: You	've got an alert for the	mailbox 'Jo	ohn Snow'. 4/	30/202	3 9:47 AM	View Alerts								
EW	🗟 dea	ACTIVATE	前 DELETE 📲	EXPORT	TO WORD	*	🖹 CREATE	DOCUMENT	ස EMAIL A LIN	K 🔅 RUN WORK	FLOW 🕨	START DIALOG	₀∕ ^a FLOW ▼	•••		
			MSCRM-ADDO	NS.COM	PRODUCT	'S : IN	IFORMATI	ION								
			GroupCale	endar	*≡											
			▲ General													
			Name *		GroupCa	alenda	ar						Subscr	iption Number		
			Product Type		server								Sched	uler	GroupCalendar Schedule	er
			Search Results	· •												
			WebApplication	nPort												
			Name 个					KeyValue			IsCacheo	d Created	d On			
			WebApplication	nPort			ł	https://group	ocalendar2015EU	W001.mscrm-a	Yes	4/6/20	20 1:50			

Figure 32: WebApplicationPort entry

Step 9: Open the **WebApplicationPort** and replace the existing KeyValue with the following: [httpsPort]][httpPort]][claimsbased]][addonname]][debugging]

Example: 4446|5557|true|activitytoolsserver|false

We have finished the configuration of the Dynamics 365 part and now need to configure the **AD FS**.



Step 10: Please log onto your AD FS Server and start AD FS 2.0 Management.

Step 11: On the action menu located in the right column, click **Add Relying Party Trust**.

Step 12: In the Add Relying Party Trust wizard, click Start.

Step 13: 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.

Step 14: Type this URL in your browser and verify that no certificate-related warnings appear and click **Next**.

Step 15: On the **Specify Display Name** page, type in a display name, such as **DocumentsCorePack IFD**, and click on **Next**.

Step 16: On the **Choose Issuance Authorization Rules** page, leave the **Permit all users to access this relying party** option selected and then click **Next**.

Step 17: On the Ready to Add Trust page, click Next and then Close.

Step 18: 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.

Step 19: In the **Claim rule template** list, select the **Pass Through or Filter an Incoming Claim** template, and then click **Next**.

Step 20: Create the following rule:

- **Claim rule name**: Pass Through UPN (or something descriptive)
- Add the following mapping:
 - Incoming claim type: UPN
 - Pass through all claim values

Step 21: Click Finish.

Step 22: In the Rules Editor, click Add Rule.



Step 23: In the Claim rule template list, select the Transform an Incoming Claim template and then click Next.

Step 24: Create the following rule:

- Claim rule name: Transform Windows Account Name to Name (or something descriptive)
- Add the following mapping:
 - Incoming claim type: Windows account name
 - Outgoing claim type: Name
 - Pass through all claim values

Step 25: Click **Finish** and when you have created all three rules, click on **OK** to close the **Rules Editor**.

You have now 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:

Reason 1: You may be using a wrong certificate for the AD FS signing. Make sure the thumbprint in the web.config matches the one of the token signing certificate in AD FS.

```
<issuerNameRegistry
type="Microsoft.IdentityModel.Tokens.ConfigurationBasedIssuerNameRegistry,
Microsoft.IdentityModel, Version=3.5.0.0, Culture=neutral,
PublicKeyToken=31bf3856ad364e35">
<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 snap-in 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 not any http/https bindings in Dynamics 365?
- Are there not any http/https bindings in the product's website?
- Is the DNS correctly resolving the products link?
- Has the ConnectionProfile been created with IFD as the connection type?

Server Error in '/'	Application.
	the security token was not recognized by the IssuerNameRegistry. To accept security r, configure the IssuerNameRegistry to return a valid name for this issuer.
Description: An unhanded exception po	curred during the execution of the current wido request. Please review the stack trace for nore information about the error and where it originated in the code.
Exception Details: Systemidentlyfod on Igers the isovertisesRepairy to return a	NITOKENS SecurityTokenException: Dx175. The losuer of the security token was not recognized by the losuer/lamaRagistry. To accept security takens from this lasuer, a valid name for this lasuer.
Source Error:	
	generated during the execution of the current web request. Information regarding the origin and can be identified using the exception stack trace below.
itack Trace:	
Wicrosoft.IdentityWodel.Tok Wicrosoft.IdentityWodel.Tok Wicrosoft.IdentityWodel.Tok Wicrosoft.IdentityWodel.Wob Wicrosoft.IdentityWodel.Wob System.Wob.SyschwortExecuti	5: The issuer of the security token was not recoprized by the IssuerNameRegistry. To accest security tokens from this em.SamTil.SamTilSecurityTokenMandler.CreateClaims(SamTSecurityToken samTSecurityToken) +719 ons.SamTil.SamTilSecurityTokenMandler.CreateClaims(SamTsecurityToken token) +644 em.SecurityTokenMandlerCollection.ValidateToken(SecurityToken token) +817 .TokenReceiver.AuthenticateToken(SecurityToken token, Boolean ensureBeareTsRen, String endpointUri) +151 .vSFederationAuthenticateToken(SecurityToken token, Boolean ensureBeareTsRen, String endpointUri) +151 .vSFederationAuthenticateTomModule.OnAuthenticateRequest(OSject sender, EventArgs args) +521 .vSFederationAuthenticateTomModule.ExecutionExp.Security_skence(+) +80 .uSFederationAuthenticateTomModule.Beacetingtp,Execute(>+80 ExecuteStep(IExecutionStep step, Boolean4 completedExect(Sec) +270
ersion Information: Norset ACT	Franceson's Version 4.0.30319. ASP 1827 Version 4.0.38519.237

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 turning Windows features on or off.

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

Step 1: Start by running the **Server Manager**, if it is not already open, by either of these two options:

Step 2: On the Windows taskbar, click the Server Manager button.Step 3: On the Start screen, click the Server Manager button.

Step 4: Under the Manage menu, select Add Roles and Features (or press Add roles and features under the Dashboard panel).



Step 5: On the Before You Begin screen, click Next.

Step 6: On the Installation Type screen, select Role-based or Feature-based Installation and click **Next**.

Step 7: On the Server Selection screen, select the appropriate server, leave the default options, and click **Next**.

Step 8: On the Server Roles screen, click Next.

Step 9: On the Features screen, select **Windows Identity Foundation 3.5** and click **Next**.

	Add Roles and Features Wizard	
Select features		DESTINATION SERVER CRM.onneet.local
Before You Begin Installation Type	Select one or more features to install on the selected server. Features	Description
Server Selection Server Roles Features Confirmation Results	Vindows Sever Migration Tools Windows Standards-Based Storage Management Windows Ter Biller Windows Ter Biller Windows Standards-Based Storage Management Windows Windows	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 superceded by WI 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.
	< Previous Next	Install Cancel

Figure 34: Windows features - WindowsIdentifyFoundation 3.5

Step 10: On the confirmation screen, select **Restart the destination server automatically if required** and click **Install**:



B	Add Roles and Features Wizard
Confirm installation	on selections
Before You Begin	To install the following roles, role services, or features on selected server, click Install.
Installation Type	Restart the destination server automatically if required
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, click Previous to clear their check boxes.
Features	
Confirmation	Windows Identity Foundation 3.5
Results	
	Export configuration settings Specify an alternate source path
	< Previous Next > Install Cancel

Figure 35: Confirm installation selection

Step 11: When the installation is completed, the wizard reflects the installation status on the Results screen

Step 12: Click Close to exit the wizard.



6. DocumentsCorePack Templates

DocumentsCorePack templates are predefined Word templates that have some DocumentsCorePack merge fields in it. You can define several templates for each Microsoft Dynamics 365 entity (For example: account, contact, etc.).

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.

Please 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) for more information about the creation of DocumentsCorePack templates.

6.2. Import/export existing DocumentsCorePack templates

Open your DocumentsCorePack Server Configuration and choose the organization for which you want to import/export the Templates and click on the **OK** button.



To open the **Organization overview** again, after closing, search in the Windows Start pane **Configuration – DocumentsCorePack for Dynamics 365**.

	MSCIM- addons. COM Your company for MS-CRM ADD-ONS!
--	---

🚱 View Organization Installation States - DocumentsCorePack 2020.136							- 🗆	\times			
	n overview organization in the license managemen	-	anization specific	functio	onalities, like			MSCIM-a DocumentsCore	ddons.c	ics 365	
					Available Org	anizations:				\sim	
Friendly name	Unique na	ame	Installation State			BuildNr.	Document	CorePack by mscri	m-addons.com	Docume	
CRM168820	unqfe9a3	6ddb2d3ed11aed	DocumentsCorePac	k is INS	TALLED	2020.136	2020.136			2020.2	
-											
<										>	
Reinstall/Upgrade	LicenseManager	Uninstall	Get IFD Setup	Config	jurations 🔻				Clo	ose	
					Client & Se	erver Ba	ased ge	neration se	ttings		Launch
				Ű	Configure Clier	nt & Serve	er Based de	ocument genera	ation settings		
					🗌 Enable debu	igging (Ca	aution! Slov	N)			
					Service Co	nfigura	tion				Launch
				6		e for Serv	er Based D	ocument Gener	ration in Dyna	mics 365-	Online and
					print jobs						

Figure 36: Click in the Organization overview Client & Server Based setting

This action will open the DocumentsCorePack Template Designer Configuration. Select the General Settings.



Import DCP Template	es Export All Templates
Language	en 🛩
Debug	
Datasource:	user-dependent 🗸
Names to cut	parentcustomerid-pc1, parentaccountid- pa1, nation name id-nn1
Replace Special Characters	 ,– -,
Additional Entities	pricelevel, territory
Entities don't show	invoicedetail, quotedetail, opportunity opportunity opportunity
Unavailable Entities	accountleads, annualfiscal calendar, ap plication file, asyncoperation, attachme
Folder Displayattribute	
Here you can define the a entity which should be us foldername (affects both, File Explorer). You could is setting when you don't s documents in one of this default the "name" attribu	sed for the SharePoint and gnore this ave your locations. Per
Metadata Cache (Not create	ed) : Create
Server Base	ed Document Generation Settings

Figure 37: General Settings

From here you have the option 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.



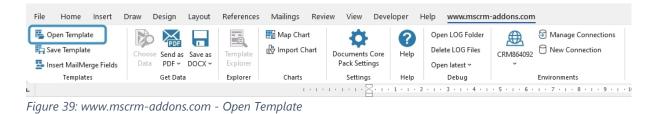
DocumentsCo	Pack Server Config v2020.136 // CRN — 🗌 🔀	100
CommandBar	Seneral Settings SharePoint Advanced	
	Import DCP Templates Export All Templates	
	DocumentsCorePack Template Import Mana — — — × Template Import Manager Please select one of the below options, to either import, export or transfer your DocumentsCorePack Templates	
	Import from File	
	Export to Zip	
	Transfer to Organization	
	Settings 2020.136	
	Metadata Cache (Not created) : Create	
	Server Based Document Generation Settings	
	OK Cancel	

Figure 38: the template import manager



For more information about how the Template Import Manager works, please have a look at the <u>corresponding documentation</u> (Chapter 5 DCP Template Import Manager).

Now the templates are imported/exported in MS Word and ready to use. Next, go to the **www.mscrm-addons.com** to open the DocumentsCorePack Template Designer and click **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 XML File.

7.1. Language Settings in DocumentsCorePack Template Designer

This chapter outlines how to modify the language settings on the DocumentsCorePack Template Designer.

7.1.1. Location of the Language Settings in the DocumentsCorePack Template Designer

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 DocumentsCorePack Template Designer. Each DocumentsCorePack Template Designer can have its own language settings and files.

Please note: These language 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 DocumentsCorePack Template Designer

The UI language is determined during start up 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 EDVSysteme**
- 4. DocumentsCorePackClient2018.
- 5. Change the value of the **language** setting to another language.
- 6. Close the registry editor.

Please note: To use a language other 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 must open the registry and change the value of the **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 in Dynamics 365

This chapter outlines how to modify the language settings on the Server.

7.2.1. Location of the Language Settings in Dynamics 365

The UI of the 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 the 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**

Please note: The language XML files from the server and client component are different. If you want to translate DocumentsCorePack, you must translate both files, the language file on the client and on the server.

Please note: To use a language other than English, you must 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. Location of the Language Settings in Dynamics 365

The UI of the DocumentsCorePack 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 the 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

Please note: The language XML files from the server and client component are different. If you want to translate DocumentsCorePack, you must translate both files, the language file in DocumentsCorePack Template Designer and in Dynamics 365.

Please note: To use a language other than English, you must 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.

7.2.3. 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.

8. Important information

If you change the NamesToCut KEY, 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

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 must edit them! (One way to do so is by using the Replace



function of Word). Sometimes it will be better 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 must add every field to the settings.

9. Uninstall DocumentsCorePack Server Component

To uninstall the DocumentsCorePack for Microsoft Dynamics 365, select **Programs and Features** in the Control Panel.

Search for the DocumentsCorePack for Dynamics 365 and with a right-click you can **Uninstall** DocumentsCorePack.

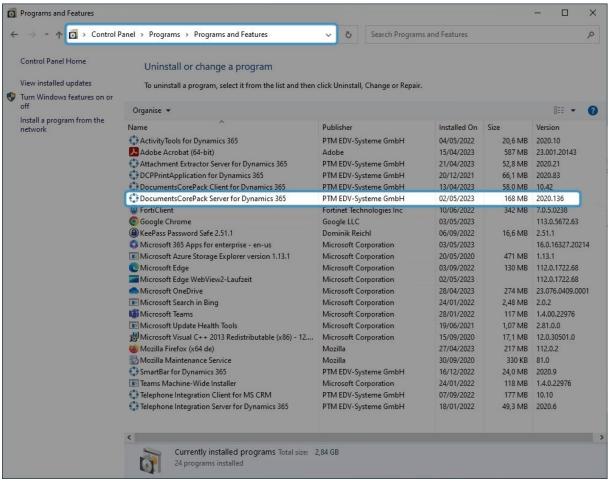


Figure 40: Uninstall DCP Server for Dynamics 365



Confirm your choice.





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11. Contact

For further technical questions, please visit our <u>blog</u> or contact <u>support@mscrm-addons.com</u>. For sales and licensing questions please contact <u>office@mscrm-addons.com</u> or the corresponding contact information below.



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