

AttachmentExtractor for MS CRM 2013

Version 2013.5 - April 2014

Installation Guide (How to install/uninstall AttachmentExtractor for MS CRM 2013)

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Table of Contents

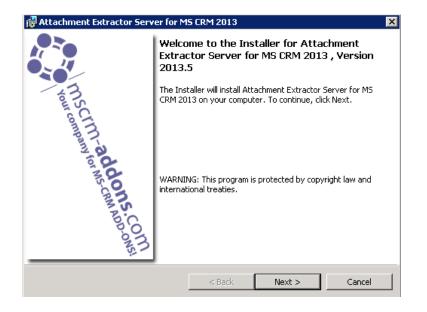
| 1 | INSTALLATION ATTACHMENTEXTRACTOR | 3 |
|-----|-----------------------------------|---|
| 1.1 | Introduction | 3 |
| 1.2 | EULA (End User License Agreement) | 3 |
| 1.3 | Folder Selection | 4 |
| 1.4 | Confirm Installation | 4 |
| 1.5 | Configure CRM Server | 5 |
| 1.6 | Finish | 6 |
| 2 | SECURITY ROLES | 7 |
| 3 | UNINSTALL ATTACHMENTEXTRACTOR | 8 |
| 4 | CONTACT | 9 |
| | | |



1 Installation AttachmentExtractor

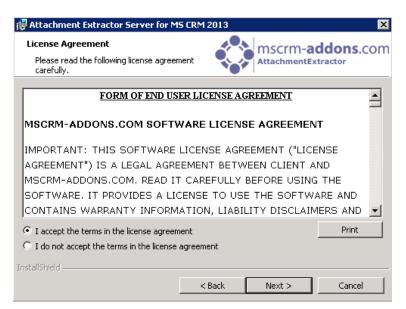
During the installation you have to specify an organization of CRM 2013, where **AttachmentExtractor** will be installed initially. Additional organizations can be setup from the installation manager after the original setup has finished.

1.1 Introduction



2 Click [NEXT] on the Welcome-Page.

1.2 EULA (End User License Agreement)

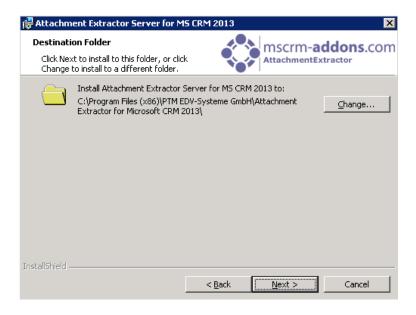


You have to accept the license and click [NEXT]



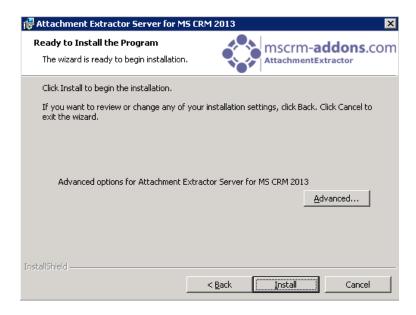
1.3 Folder Selection

Choose the installation folder:



Click [Change] to specify a different installation path.

1.4 Confirm Installation



To start the installation of AttachmentExtractor click [Install]



1.5 Configure CRM Server

AttachmentExtractor requires a connection to CRM. To configure your CRM Server, select an existing profile or create a new profile:

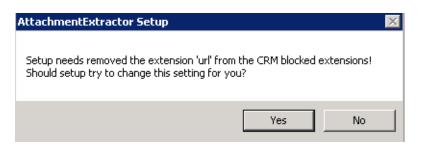
| Logon information | | | | |
|--|---------------------------------------|--------------|--|--|
| Welcome to your CRM Co | Welcome to your CRM Connection setup. | | | |
| Please specify your connection details to connect to CRM. If you do not know the connection details, | | | | |
| please contact your system administra | | | | |
| | | | | |
| CRM Connection Advanced Settings L | og | | | |
| Existing Profiles | | Manage | | |
| Select your Crm Type | | | | |
| Standard (onPremise) | C IFD (Hosted) | C Crm Online | | |
| CRM Server-Url: | | | | |
| http:// | | | | |
| -Authenticated as: | | | | |
| Use default Credential: Not enough | information to retrieve organizations | | | |
| Username | Domain Pas | sword | | |
| | 1 | | | |
| | Retrieve all Organizations | | | |
| Organization information: | | | | |
| Friendly name Unique name | ServiceURL | | | |
| | | | | |
| | | | | |
| 1 | | | | |
| Reset LiveID Cache | | OK Cancel | | |

Choose 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.

| gon information | | | | |
|--|---|-------------------------------|------------------------------|--|
| | OUT CRM Conn connection details to system administrator | connect to CRM. If you do not | know the connection details, | |
| CRM Connection Advanced Settings Log | | | | |
| Existing Profiles | [HKLM] crm2013 - Cont | 050 | ▼ Manage | |
| Select your Crm Typ | e | | | |
| Standard (on F | Premise) | C IFD (Hosted) | C Crm Online | |
| Authenticated as: Use default Credential: CONTSOSO \administrator Username administrator Domain CONTSOSO Password ********* Retrieve all Organizations Organization information: | | | | |
| Friendly name | Unique name | ServiceURL | | |
| 2013 crm2013 | crm2013 | crm2013 | | |
| 🧱 Contoso | Contoso | Contoso | | |
| Reset LiveID Cack | ne | | OK Cancel | |



If following Message Box appears, click on [Yes].



This will open next Message Box:

| × | |
|---|--|
| Setup has removed the extension 'url' from the CRM blocked extensions! (CRM => Settings => Administration => System Settings, Tab general, Set blocked file extensions) | |
| Attachments are replaced with a '.url' file, requiring that extensions to be allowed in CRM Attachment Extraction Setup System Change | |
| OK | |

Click on [OK] to confirm.

1.6 Finish

| 🛱 Attachment Extractor Server for M5 CRM 2013 🛛 🗙 🗙 | | | | |
|---|---|--|--|--|
| | InstallShield Wizard Completed | | | |
| MSCIM-add Your company for M | The InstallShield Wizard has successfully installed Attachment Extractor Server for M5 CRM 2013. Click Finish to exit the wizard. | | | |
| 1-addo | | | | |
| Ions: COMSI | | | | |
| | < Back Finish Cancel | | | |

Click on [Finish] to complete the installation.



2 Security Roles

During installation, you are asked if you want to install the 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 to be able to perform the license check.

Click on [Yes to apply the security role to all users.

Attention: Bypassing this step requires you to either manually assign the roles to all users or to include the rights into your existing security roles!



3 Uninstall AttachmentExtractor

To uninstall AttachmentExtractor, open "Uninstall a program" in the Control Panel

|] | All Control Panel Ite | ms 📃 🗖 🗙 |
|-------------------------------------|---------------------------|---------------------------------------|
| 🔄 🏵 👻 🛧 📴 🕨 Control Panel 🕨 | All Control Panel Items 🔸 | ✓ C Search Control Panel P |
| Adjust your computer's settings | | View by: Small icons 👻 |
| The Action Center | 🖄 Administrative Tools | 🛃 AutoPlay |
| 💶 Color Management | Credential Manager | 🕒 Date and Time |
| 📷 Default Programs | 📇 Device Manager | devices and Printers |
| 🛄 Display | Ease of Access Center | F Folder Options |
| 🗽 Fonts | 🔒 Indexing Options | 🕼 Install Application on Remote Deskt |
| 🔂 Internet Options | 🍓 iSCSI Initiator | 💷 Keyboard |
| 🗫 Language | (32-bit) | Mouse |
| Network and Sharing Center | 🔜 Notification Area Icons | 📰 Phone and Modem |
| Power Options | Programs and Features | 🔗 Region |
| 🐻 RemoteApp and Desktop Connections | 🛋 Sound | 🕎 System |
| 🖳 Taskbar | 🔁 Text to Speech | Troubleshooting |
| 🎎 User Accounts | 💣 Windows Firewall | 🐼 Windows Update |

Find "AttachmentExtractor for MS CRM 2013", select it and click on "Uninstall".

| X | Programs and Features | | - • × | |
|--|--|-----------------------------------|---------------|--|
| | | | | |
| Control Panel Home View installed updates Turn Windows features on or off | Uninstall or change a program To uninstall a program, select it from the list and then Organize Uninstall | click Uninstall, Change, or Repai | ir. ≋≕ ▼ @ | |
| Install a program from the | Name | Publisher | Installed (| |
| network | ActivityTools for MS CRM 2013 | PTM EDV-Systeme GmbH | 06.02.201 | |
| | Activity roots for M3 CRW 2013 | Adobe Systems Incorporated | 20.01.201 | |
| | Adobe Reader XI (11000) - Dedisch | PTM EDV-Systeme GmbH | 28.10.201 | |
| | AutoMerge Server for MS CRM 2013 | PTM EDV-Systeme GmbH | 04.02.201 | |
| | DocumentsCorePack Client for MS CRM 2013 | PTM EDV-Systeme GmbH | 18.02.201 | |
| | DocumentsCorePack Server for MS CRM 2013 | PTM EDV-Systeme GmbH | 11.11.201 | |
| | Fiddler | Telerik | 16.10.201 | |
| | O Google Chrome | Google Inc. | 15.10.201 | |
| | GroupCalendar for MS CRM 2013 | PTM EDV-Systeme GmbH | 10.03.201 | |
| | Microsoft Dynamics CRM 2013 für Microsoft Office O | Microsoft Corporation | 30.01.201 | |
| | Microsoft Dynamics CRM 2013 German Language Pack | Microsoft Corporation | 30.01.201 | |
| | Microsoft Dynamics CRM Server 2013 | Microsoft Corporation | 09.01.201 | |
| | Microsoft Office Professional Plus 2013 | Microsoft Corporation | 16.10.201 | |
| | Microsoft Online Services-Anmeldeassistent | Microsoft Corporation | 27.11.201 | |
| | Microsoft ReportViewer 2010 Redistributable | Microsoft Corporation | 11.09.201 | |
| | 🥪 Microsoft Silverlight | Microsoft Corporation | 14.03.201 | |
| | Microsoft SQL Server 2008 Native Client | Microsoft Corporation | 11.09.201 | |
| | Microsoft SQL Server 2012 Management Objects (x64) | Microsoft Corporation | 11.09.201 | |
| | | NC 0.0 C | > | |
| | PTM EDV-Systeme GmbH Product version Help link | 6.1 www.mscrm-addons.com | | |



Following window appears:

| Programs and Features | | |
|---|--------|--|
| Are you sure you want to uninstall Attachment Extractor Server for MS CRM 2013? | | |
| In the future, do not show me this dialog box | Yes No | |

Confirm the question if you're sure to uninstall AttachmentExtractor Server for MS CRM 2013. Click on [No] if you don't want to uninstall AttachmentExtractor Server for MS CRM 2013.

It may take a few minutes to uninstall AttachmentExtractor.

4 Contact

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

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