



mscrm-addons.com
DocumentsCorePack
for Microsoft Dynamics CRM

AttachmentExtractor Online Configuration for Dynamics 365

August 2021

How to work with AttachmentExtractor Online Dynamics 365.

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Preamble

This documentation is intended to guide you through the installation and usage of DocumentsCorePack and AttachmentExtractor Online Configuration for Microsoft Dynamics 365.



AttachmentExtractor Online was first introduced in 2017. This means, that the *Add-On* works with Microsoft Dynamics 365 only!

Target Audience

This guide is intended for users applying search queries with AttachmentExtractor who have the following minimum skills:

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

Purpose of DocumentsCorePack and AttachmentExtractor Online Configuration

The DocumentsCorePack and AttachmentExtractor Online Configuration has many advantages, one of them being the reason that a local server is not required anymore. This means, that precious storage space is saved on your local server, while all ServerBased features of the add-ons are available. Furthermore, the services are hosted and updated by our support team.

1 Basics on Online Configuration

This documentation is divided into three parts. While the first part is filled with basic information on the online configuration, which is the same for DocumentsCorePack and AttachmentExtractor, part 2 and 3 of this documentation focus clearly on the differences between DocumentsCorePack and AttachmentExtractor.

ADDITIONAL MATERIALS

Next to this documentation, we do provide video tutorial for [AttachmentExtractor](#) that show how to start the Online Configuration step by step.

Also, you can find further information regarding the AttachmentExtractor Online Configuration [here](#).

For more detailed information, please read the now following chapters carefully.

1.1 How to start the Online Configuration

Start the Online Configuration for AttachmentExtractor by selecting the product and following the steps below.

1.1.1 Step 1: Open the Online Configuration Service for AttachmentExtractor

One possible way to start a new Online Service Configuration is via our website www.msrm-addons.com. On our website, please navigate to Products, select AttachmentExtractor and then, click on the **[Start Tial (Service Setup)]**-button.

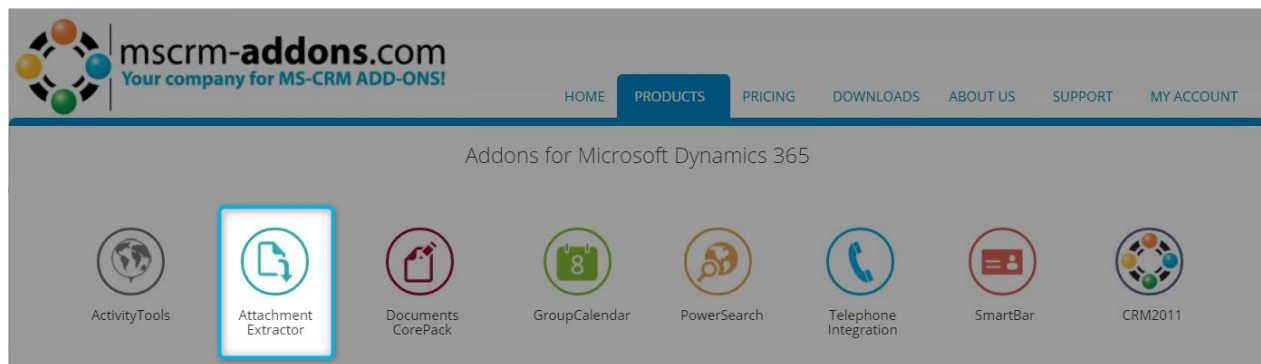
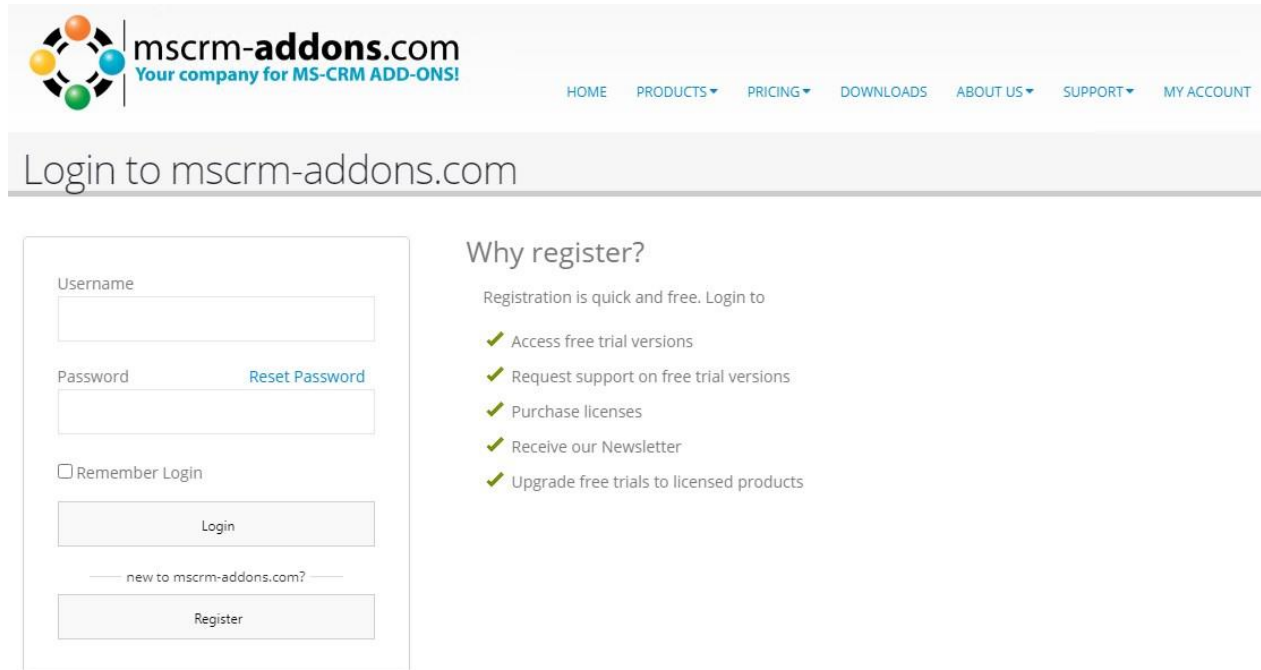


Figure 1: Select AttachmentExtractor add-on for the Online Configuration

1.1.2 Step 2: Login or register to mscrm-addons.com



The screenshot shows the mscrm-addons.com website header with a navigation menu (HOME, PRODUCTS, PRICING, DOWNLOADS, ABOUT US, SUPPORT, MY ACCOUNT). Below the header is a login section with a form containing fields for Username and Password, a 'Reset Password' link, a 'Remember Login' checkbox, and 'Login' and 'Register' buttons. To the right of the form is a 'Why register?' section with a list of benefits: Access free trial versions, Request support on free trial versions, Purchase licenses, Receive our Newsletter, and Upgrade free trials to licensed products.

Figure 2: Login to mscrm-addons.com

1.1.3 The Online Configuration window

Once you have logged in, you will be provided with the Online Configuration window. Navigate to the "AttachmentExtractor"-tab, to configure a service for.

1 In this window's field, you get an overview of your hosted service(s). Provided, that you have already configured a service.



If there is no service configured, the field is empty.

Also, you have the possibility to setup a service with a click on the 2 **[Add]**-button.

AttachmentExtractor Online Configuration for Dynamics 365.

Hello kog

Version 2020.06.7898.27199

On this page you can configure DocumentsCorePack or AttachmentExtractor for your CRM organization. [Take a quick tour](#)

DocumentsCorePack ServerBased (2) **AttachmentExtractor (1)**

Your available AttachmentExtractor services

ID	Name	Status	Mode	Organization	CRM	Instance
37...	unq5f4e519c608d4307a7e2d702467b2	⚠ Stopped	Copy	CRM614680	https://org0f6f8b03.crm4.dynam...	https://attexteu...

Search...

1

2

+

Figure 3: Online Configuration window

1.2 How to setup an MS Dynamics 365 Online Service for AttachmentExtractor

First, a connection to MS Dynamics 365 must be established via the CRM connection profile, which is required to connect Microsoft Dynamics 365 Online with your Microsoft Dynamics 365 organization.

Once you have setup your connection, you are ready to set up an AttachmentExtractor Service.

Look for further information on the setup of the configuration in [CHAPTER 2, ADVANCED ONLINE CONFIGURATION](#).



To establish the connection for AttachmentExtractor, please note that admin rights are required.

1.2.1 CRM Connection Setup – Settings

Find here a detailed description of the connection setup settings.

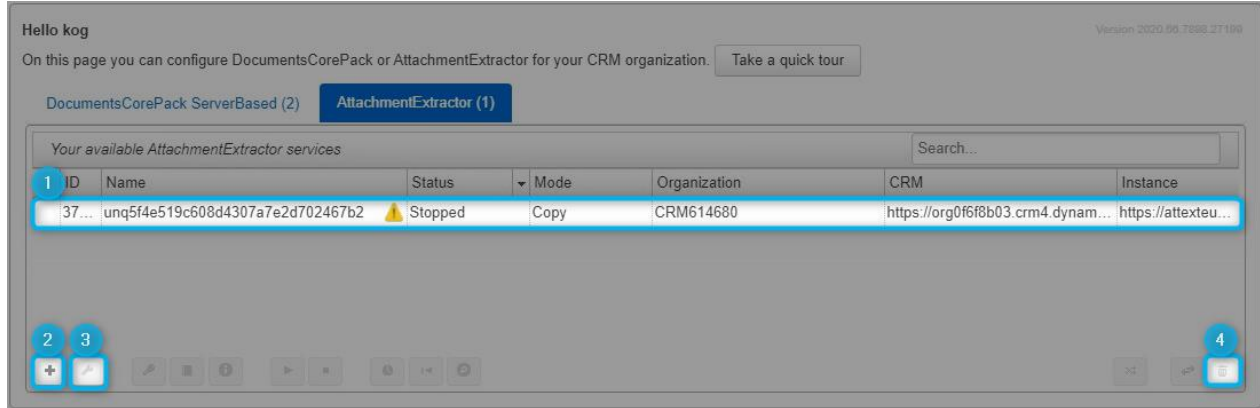


Figure 4: Available Online Services

1 CRM ONLINE SERVICES

In this section, you are provided with an overview of all available services. With a double-click on the service, you have the possibility to edit your service.

2 THE [ADD]-BUTTON

Please click on this button to add a new service. Next, click on the **[Connection Profile]**-button. In the so opened window, please enter your settings and click on the **[Verify Connection & Save Profile]**-button in the right lower corner. For further information, please have a look at [CHAPTER 3.1, HOW TO CREATE A CRM CONNECTION PROFILE](#).

3 THE [MANAGE]-BUTTON

Click here to modify the MS Dynamics 365 service and connection profile. Alternatively, you could double-click on the service you would like to modify. You will be provided with the details of your MS Dynamics 365 Online service and connection profile (please also see picture 7).



If a service is currently used by a DocumentsCorePack Service or AttachmentExtractor Configuration, you will only be allowed to change the user credentials. Also, you must select the same organization.

4 THE [DELETE]-BUTTON

If you do not need your Online service anymore, please click here to delete it. If you try to delete a service.

2 Advanced Online Configuration

During this chapter, you will find the advanced options explained in detail.

2.1 The Service Configuration Settings for AttachmentExtractor

Please find a detailed description on how to setup the service configuration in [CHAPTER 1](#). This chapter explains the general service configuration.

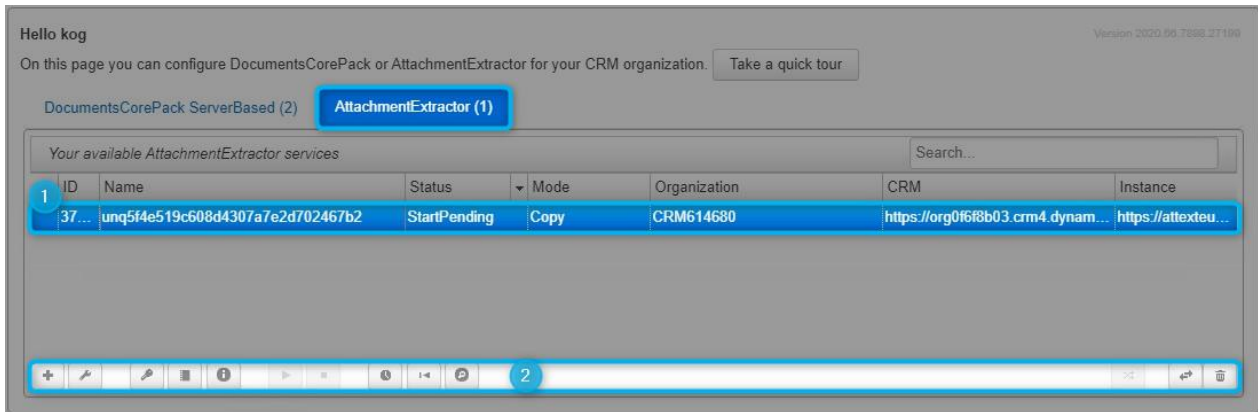


Figure 5: DCP Service Configuration Settings

1 SERVICE CONFIGURATION

This section provides you with an overview of your configured AttachmentExtractor Services. With a double-click on the configuration, you get the possibility to edit the service.

2 SERVICE CONFIGURATION BUTTONS

The buttons described here enable you to configure and modify your service, but a service has to be selected previously.

Certain functionalities can be applied to AttachmentExtractor. During this chapter, you will find a detailed description to the different functionalities.

2.1.1 The AttachmentExtractor Configuration buttons

AttachmentExtractor Online Services can be configured in different ways. Below, you will find a short description of how to configure these buttons.



Figure 6: AttachmentExtractor Configuration Buttons

1. ADD A NEW ATTACHMENTEXTRACTOR SERVICE OR CONFIGURE AN EXISTING ONE

Simply click on the **[Add]**-button (+) to create a new AttachmentExtractor Service.

Please click on the **[Configure Service]**-button (monkey wrench) to modify the DocumentsCorePack Service settings. A double click on the service you would like to modify has the same effect.

2. VIEW AND INSTALL LICENSE

If you click here, you will be provided with an overview of the installed license.

3. VIEW SERVICE LOGS

A click on this button enables you to see the service logs, as well as the processed documents and failures. If the service cannot be started, you will find the reason within these log-entries. A double-click on a certain row will open the Service Log Details.

4. VIEW VERSION INFO

A click on this button opens the *Version Information* window. Here, you get an overview on your license. With a click on the **[Reinstall/Upgrade]**-button, you can as well reinstall or upgrade your license.

5. START THE SERVICE

Click on the **[Start]**-button to start the service. The service does not start automatically.

6. STOP THE SERVICE

Click on the **[Stop]**-button to stop the service.

7. VIEW PROGRESS AND HISTORY

Click on this button to see the notes, e-Mails and attachments, that have been processed previously. You will also be provided with information regarding the already transferred data and the range of processed notes/e-Mails.

8. RESET EXTRACTION

A click on this button resets the whole extraction progress for the current organization. Handle this button with care because you CANNOT REVERT this action!

9. EXTRACTION ANALYSIS AND SINGLE ITEM EXTRACT

You can add a URL to a record or e-mail to see the extraction logic our service will apply. also you can add a URL to a record or e-mail to extract immediately.

10. MOVE/COPY SERVICE

A click on this button enables you to move or to copy the service to another instance.

11. DELETE THE SERVICE

With a click on this button, you have the possibility to delete the service. Before the service is deleted, you will be provided with the *Delete Service*-window. Here, click on the **[Delete]**-button to delete the service or click on the **[Cancel]**-button to cancel.

2.2 The AttachmentExtractor Service Configuration surface

The AttachmentExtractor Online Service Configuration service helps you to create a new service. The surface is divided into two different parts – the basic and the advanced options.

2.2.1 The basic AttachmentExtractor configuration options

Using this section, you can configure the basic options of your service. In general, setting the basic options is enough to start a service.

Create new AttachmentExtractor Service

1 Set up your CRM connection

2 Service Name (cannot be changed)

3 AttachmentExtractor Instance

4 Extraction Mode

5 Storage system

6 SharePoint Integration

7 Storage Option for Entities without Document Management enabled

8 **SharePoint Credentials**

Username: someone@example.com

Password:

9 Extract

10 Email Subfolder (max. 14 chars, letters and numbers only)

11 Note Subfolder (max. 14 chars, letters and numbers only)

12 Appointment Subfolder (max. 14 chars, letters and numbers only)

13 Data Processing

14 Minimum Attachment Size Filter: 64 kb

15 Only extract attachments older than: min. 0 hours

16 Enable text-only emails in timeline

17 Show Advanced Options

Connection Profile: AE EU

Attachments | Email content

SharePoint | AzureBlobStorage

CRM Integrated SharePoint | Specific SharePoint

Specific SharePoint Library | Do not extract

Copy - Keep data in CRM | Extract - Replace data in CRM

Save Service

Figure 7: AE configuration options

AttachmentExtractor Online Configuration for Dynamics 365.

1. CONNECTION PROFILE

Set up your CRM connection.

2. SERVICE NAME (CANNOT BE CHANGED)

If you have more than one profile, please select your preferred profile here.

3. ATTACHMENTEXTRACTOR INSTANCE

Please select here, on which instance the AttachmentExtractor Service should run. The instance with the highest bandwidth is automatically selected for you, but you can change it until you have saved the new service.

4. EXTRACTION MODE

Please specify here if you want to extract E-mail content or Attachments.

5. STORAGE SYSTEM

Decide which attachment storage system your AttachmentExtractor Service should use.

6. SHAREPOINT INTEGRATION

Make your SharePoint settings whether you want to use the CRM Integrated SharePoint or a Specific SharePoint.

7. STORAGE OPTIONS FOR ENTITIES WITHOUT DOCUMENT MANAGEMENT ENABLED

Entities without Document management can be stored daily or weekly on a specific SharePoint library. You can also decide which Entities not to extract.

8. SHAREPOINT CREDENTIALS

Please enter the credentials of a SharePoint user with administrative access to your configured SharePoint here.

9. EXTRACT

Select what do you want to extract, email attachments, note attachments or appointment attachments.

10. EMAIL SUBFOLDER

Extracted email attachments will be saved here.

11. NOTE SUBFOLDER

Extracted note attachments will be saved here.

12. APPOINTMENT SUBFOLDER

Extracted appointment attachments will be saved here.

13. DATA PROCESSING

Here you can specify if you only want to copy your attachments to SharePoint or you want to extract them completely. Once extracted the files will be replaced with a .url file that points to the extracted file on SharePoint.

14. MINIMUM ATTACHMENT SIZE FILTER

Please set the minimum size for attachments to be extracted here.

15. ONLY EXTRACT ATTACHMENT OLDER THAN

Please insert a time value here to extract only to extract attachments which are older than x hours/days/weeks or months (minimum value = 0)

16. ENABLE TEXT-ONLY EMAILS IN TIMELINE

Decide if you want to see in the timeline the email text only or the full content.

17. SHOW ADVANCED OPTIONS

See this topic later in this article.



Once the new service is saved, it is impossible to change the instance name anymore. If so, you would have to delete the service and recreate it on another instance.

2.2.2 The advanced AttachmentExtractor configuration options

Using this section, you can configure the advanced options of your service. The advanced configuration options are optional.

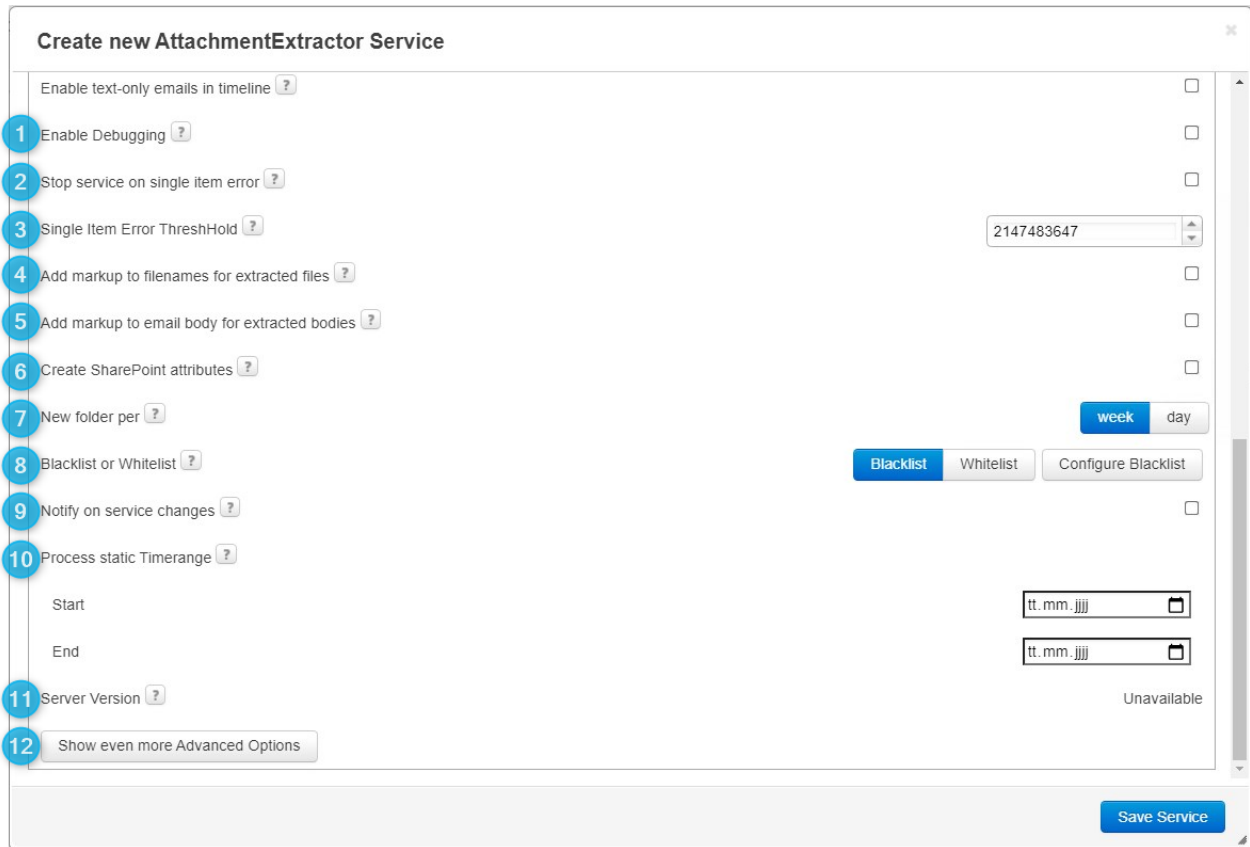


Figure 8: AE Advanced Options

1. ENABLE DEBUGGING

In case of any issues during the extraction, we would recommend you to enable debugging here. The log files will be available as soon as the service is saved.

2. STOP SERVICE ON SINGLE ITEM ERROR

This option is deactivated per default. Please note, that the service will stop if an error on a single item occurs.

3. SINGLE ITEM ERROR THRESHOLD

The service will stop after the configured amount of single item errors.

4. ADD MARKUP TO FILENAMES FOR EXTRACTED FILES

This option is activated per default. Please note that disabling will remove any visual indicator if an attachment has been extracted.

5. ADD MARKUP TO EMAIL BODY FOR EXTRACTED BODIES

This option is activated per default. Please note that disabling will remove any visual indicator, if an e-mail has been extracted.

6. CREATE SHAREPOINT ATTRIBUTES

Once enabled, this option will create SharePoint attributes for all transferred files. For further information on SharePoint attributes have a look at this article.

7. NEW FOLDER PER

Here you can decide whether you would like to create a new folder weekly or daily. This option only applies to CRM Integrated SharePoint.

8. BLACKLIST OR WHITELIST

Decide if you want to use a blacklist or a whitelist. Entities on the blacklist will not be extracted, when you configure the whitelist, only those entity attachments will be extracted.

9. NOTIFY ON SERVICE CHANGES

Select this option to receive an e-mail every time there is a service change.

10. PROCESS STATIC TIMERANGE

Limit the extraction to a specific time range.

11. SERVER VERSION

This field informs you about the current AE version on your instance.

12. SHOW EVEN MORE ADVANCED OPTIONS

1	Skip solution import ?	<input type="checkbox"/>
2	Synchronous solution import ?	<input type="checkbox"/>
3	Skip role assignment ?	<input type="checkbox"/>
4	Only count users with security role for licensing ?	<input checked="" type="checkbox"/>
5	Use SharePoint compatibility connection ?	<input checked="" type="checkbox"/>

6 Save Service

Figure 9: Show even more Advanced Options

1. SKIP SOLUTION IMPORT

If you select this option, the setup will assume that you have imported all the solutions that are necessary for the creation of a service. If a particular solution is missing, the creation of a new service will fail.

2. SYNCHRONOUS SOLUTION IMPORT

If you select this option, the setup will try to import the solutions synchronously.

AttachmentExtractor Online Configuration for Dynamics 365.

3. SKIP ROLE ASSIGNMENT

This feature was enabled in order to deal with a common issue that all users with an assigned Dynamics 365 will automatically become enabled users in every Dynamics 365 tenant and thus counts towards our license although the users have no access to the tenant. Once enabled, our licensing will count users only if they have at least one security role assigned which is not the case for auto-assigned from the Office 365 portal.

4. ONLY COUNT USERS WITH SECURITY ROLE FOR LICENSING

This Feature was enabled to deal with a common issue that all users with an assigned Dynamics 365 will automatically become enabled users in every Dynamics 365 tenant and thus counts towards our license although the users have no access to the tenant. Once enabled our licensing will count users only if they have at least one security role assigned which is not the case for auto-signed users from the Office 365 Portal.

5. USE SHAREPOINT COMPATIBILITY CONNECTION

If you select this option, a SharePoint compatibility connection will be used

3 Tutorials (“How To’s”)

This chapter provides you with helpful tutorials that show you how to work with the Online Configuration efficiently.

3.1 How to create a CRM connection profile

Before you can setup a service, you must create a CRM connection profile. Please follow the below step-by-step tutorial to start an Online Service properly.

3.1.1 Step 1: Open the Online Configuration Service

Please follow the steps in [CHAPTER 1.1, HOW TO START THE ONLINE CONFIGURATION](#) to open the Online Configuration properly.

3.1.2 Step 2: Setup a connection profile

If you already have a connection profile, you can skip this step and continue with creating a service for AttachmentExtractor. You will find a detailed description of this in the following chapters.

- 1 Select your connection type. For the online service it is Server2Server.
- 2 Type in your CRM URL
- 3 Press the **[Retrieve Organizations]**-button

AttachmentExtractor Online Configuration for Dynamics 365.

Create CRM connection profile

1 You have to specify a valid CRM connection profile. The user with which you're connecting must be in the system administrator role to set up a service.

1 Select your connection type

Server2Server App Access App Access (custom) IFD (hosted)

2 CRM URL

org9434d7a7.crm4.dynamics.com

3 Retrieve Organizations

Figure 10: Set up your CRM Connection

You will be asked to log in. Use an account with administrative rights.

Microsoft

Sign in

admin@CRM479934.onmicrosoft.com

No account? [Create one!](#)

[Can't access your account?](#)

Next

Figure 11: Log in

3.1.3 Step 3: Verify your connection

As soon as your organization appears in the Available Organizations section, click on the **[Verify Connection & Save Profile]**-button.

Create CRM connection profile

! You have to specify a valid CRM connection profile. The user with which you're connecting must be in the system administrator role to set up a service.

Select your connection type: **Server2Server** | App Access | App Access (custom) | IFD (hosted)

CRM URL: ✓

Retrieve Organizations

CRM Username: admin@CRM479934.onmicrosoft.com | Change Logon

SharePoint connection: **not set up** | Setup SharePoint Connection

Available Organizations

Friendly name	Unique name	Service URL
CRM479934	unq592bed0c93a64c369be661d104f03	org9434d7a7

Verify Connection & Save Profile

Figure 12: Retrieved Organizations



It is of utmost importance that you do not close this window or navigate away. It can take a few minutes to verify the connection.

Verify connectivity and permissions

! Please **DO NOT** close this window or navigate away!!!

- ✓ Check connectivity...
- ▒ Check permissions...
- Save CRM connection profile...

Figure 13: Verify connectivity and permissions

AttachmentExtractor Online Configuration for Dynamics 365.

After the connection is verified, this window is shown. Please press the **[Save Service]**-button to finish this process.

Create new AttachmentExtractor Service

Set up your CRM connection (CRM479934 as admin@CRM479934.onmicrosoft.com) Connection Profile

Service Name (cannot be changed) unq592bed0c93a64c369be661d104f03

AttachmentExtractor Instance AE EU (10.29 MB/s)

Extraction Mode Attachments Email content

Storage system SharePoint AzureBlobStorage

SharePoint Integration CRM Integrated SharePoint Specific SharePoint

Storage Option for Entities without Document Management enabled Specific SharePoint Library Do not extract

SharePoint Credentials

Username someone@example.com Password

Extract Email Attachments, Note Attachments

Email Subfolder (max. 14 chars, letters and numbers only)

Note Subfolder (max. 14 chars, letters and numbers only)

Appointment Subfolder (max. 14 chars, letters and numbers only)

Data Processing Copy - Keep data in CRM Extract - Replace data in CRM

Minimum Attachment Size Filter 64 kb

Save Service

Figure 14: Verified connection

Confirm with **[OK]** and wait until your service is saved. Please do not close this window or navigate away, otherwise your connection will fail. It is a good time for a little break. Enjoy some coffee.



Figure 15: Saving service

3.1.4 Step 4: Service Configuration Completed

As soon as the service configuration is completed, the subscription ID will automatically be provided by our support team.

3.1.5 Step 5: Watch your service running

Congratulation! You have finished the configuration of your service.



The number of licenses depends on which [AttachmentExtractor package](#) you are working with. If you want to change the Subscription ID, it is recommended to send an e-mail to support@mscrm-addons.com.

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5. Contact

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

For sales and licensing questions please contact office@mscrm-addons.com, or the corresponding contact information below.



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