

Related Documents for CRM

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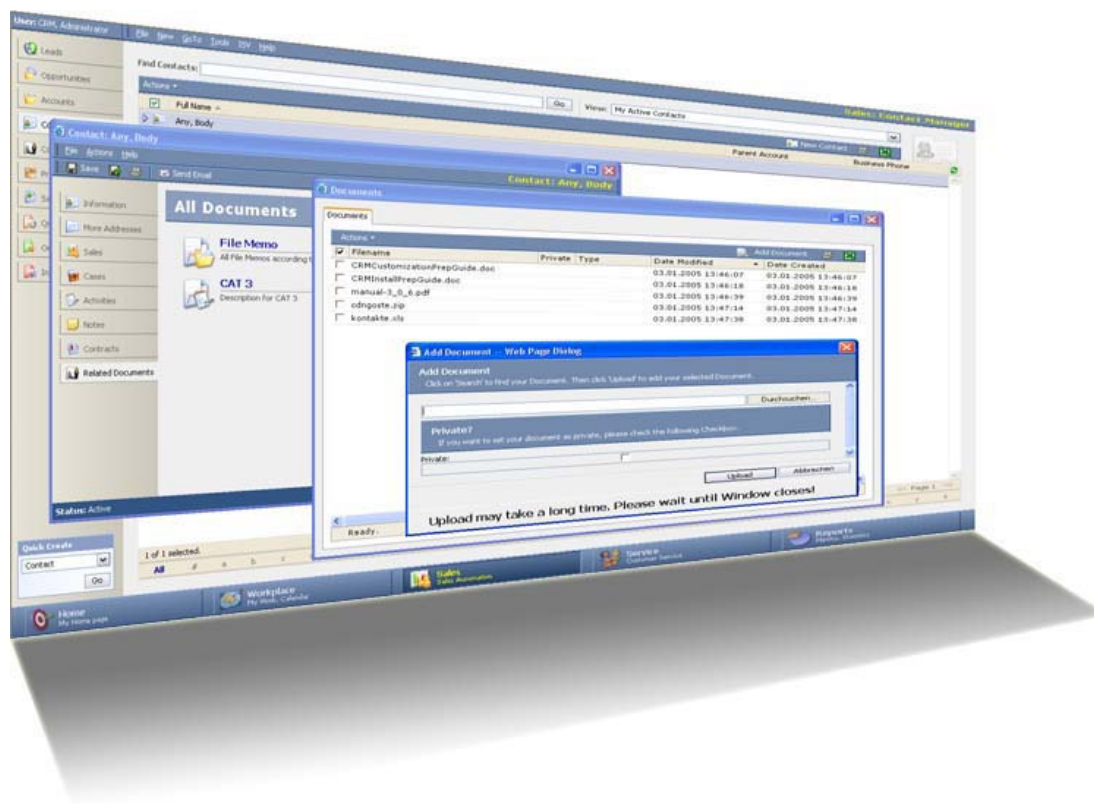
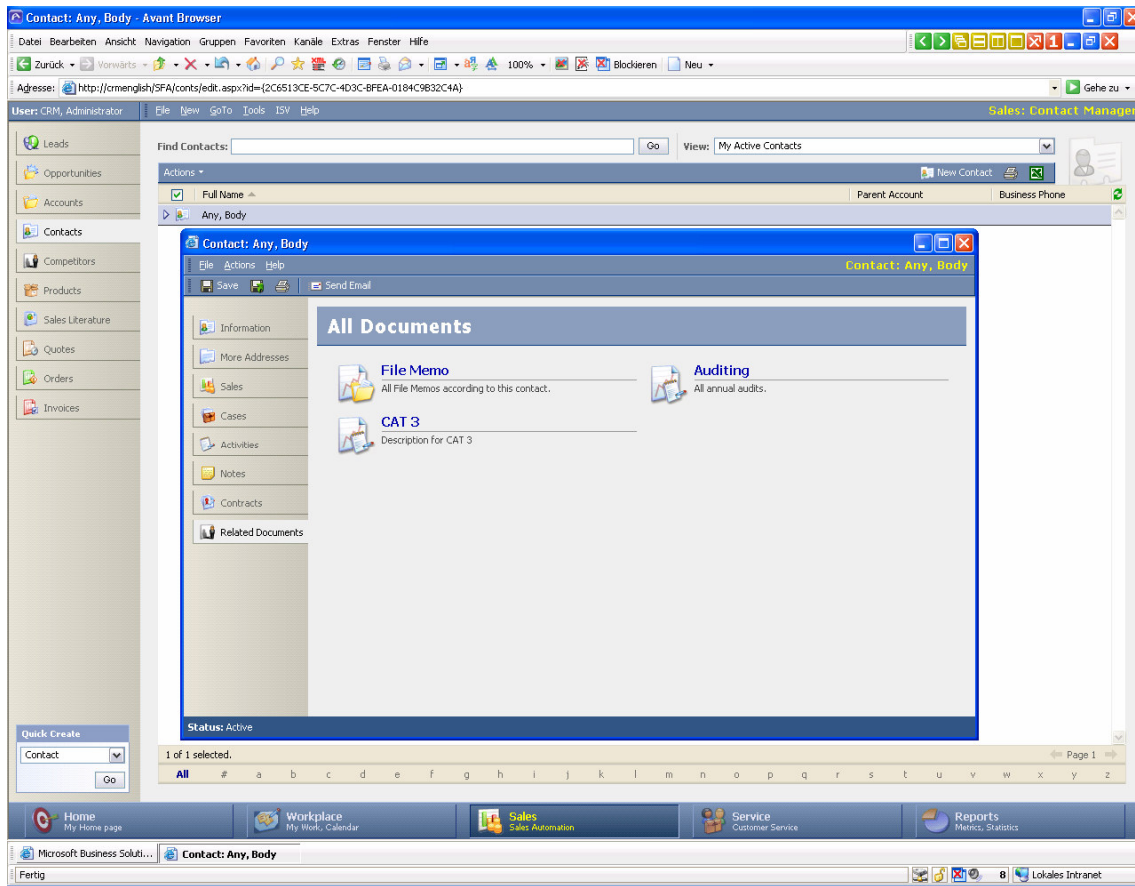


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1.1 What is it?



The Related Document Add-On for CRM (called RD in this Document) allows you to add different files to an object.

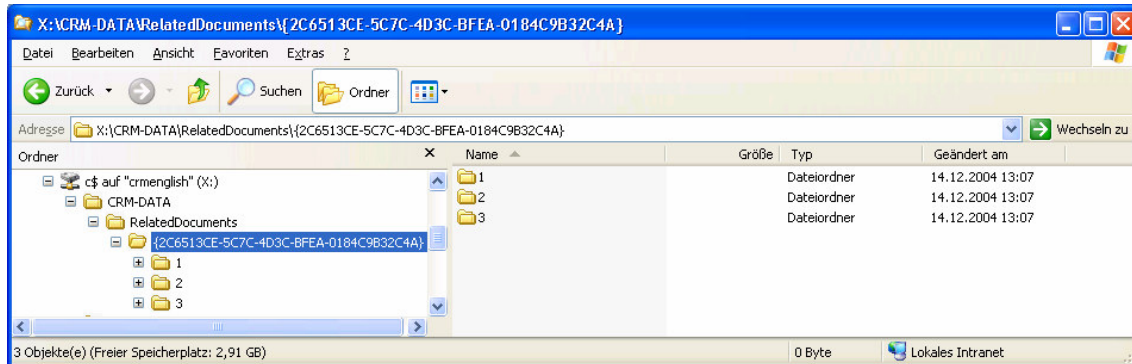
It works fully dynamically, this means you can (by the way you have to) set up many things.

- to which Object you want to add Documents (in this Document we add it to Contacts)
- the Categories (Icon, Name, Description, quantity)

1.2 Configuration

1.2.1 How it works

The RD creates an automatic Directory-System. Under the Root-Folder (the Folder “path”, see 1.2.3) the RD creates a new Folder for every object (the long GUID). Under this Folder it creates the Sub-Folders.



Each Sub-Folder is equivalent to the Categories. The Name of the Folder is given by a unique ID (1, 2, 3), so you can change the Name of the Category any time you need it. Also the ID can be changed, if it is necessary.

There are three different Files to change the Settings.

1.2.2 The isv.config File

As a CRM-Administrator your already know this file. It is needed to add Menus or NavBars to CRM. Please remember, this File will only be used if you changed the “ISVIntegration” Tag” in the Web.Config File in your CRM-Root.

```
<!--
    ISV Integration

    =====
    Using /_resources/isv.config, it is possible to customize certain Menus and Tool Bars
    throughout the application. This setting is provided as a performance optimization,
    when there are no customizations to be rendered this setting should be "Off".
    Recommended Setting: "Off" (Unless you have customized the isv.config file)
    Values: "On" or "Off"
-->
<add key="ISVIntegration" value="On"/>
```

In this Version the Installation will not be able to set these Values for you. So you have to change this File by hand.

In this Example we add the RD to contacts. Normaly you can use it 1 to 1.

```
<contact>
  <!-- The Account Left Nav Bar -->
  <NavBar ValidForCreate="0" ValidForUpdate="1">
    <NavBarItem Icon="/_imgs/ico_18_123.gif" Title="Related Documents"
    Url="/RelatedDocuments/categories.aspx" Id="Belege" PassParams="1"/>
  </NavBar>
</contact>
```

But you have to be careful!

If you do something wrong in the isv.config File your IIS may crash!

1.2.3 The web.config File

You will find this in the following Files in the \RelatedDocuments Folder. (If you used the standard CRM Installation the Path will be C:\inetpub\wwwroot\RelatedDocuments.)

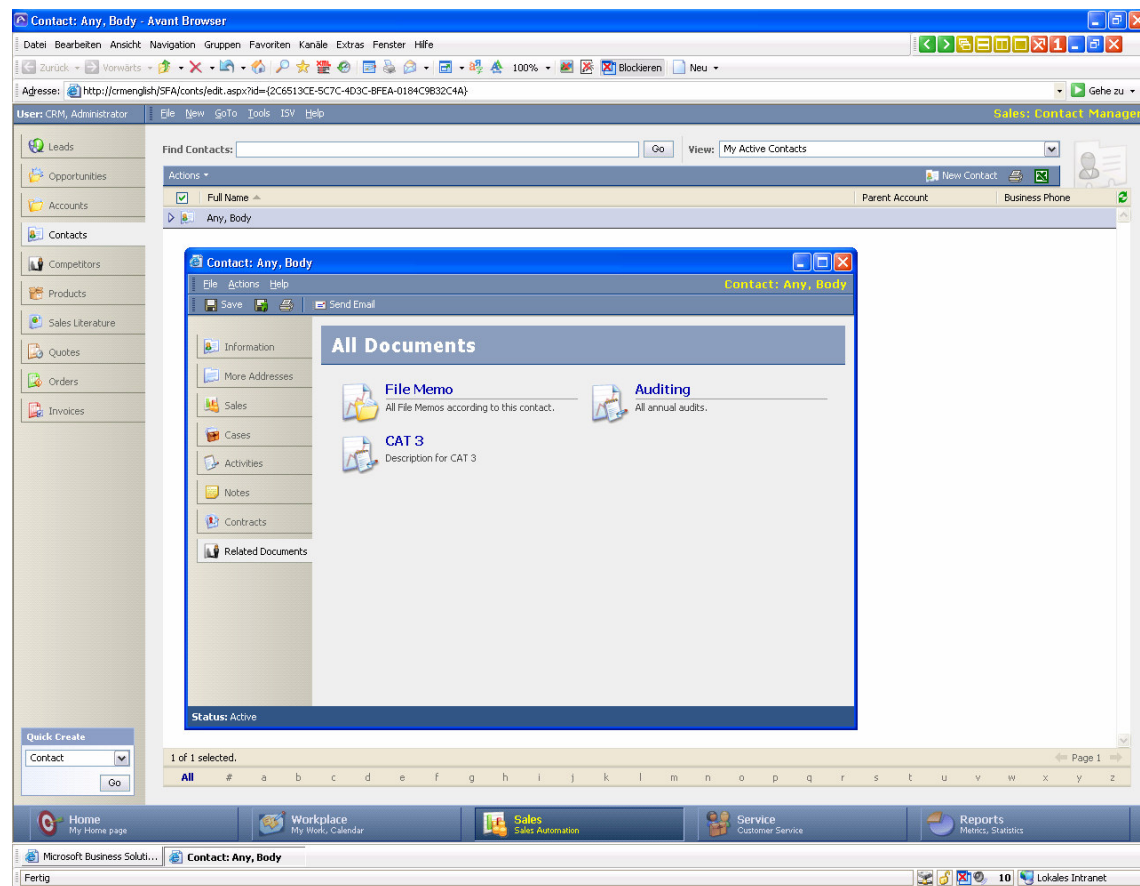
```
<appSettings>
  <add key="path" value="\\server\CRM-DATA\RelatedDocuments\"/>
  <add key="MSCRMServer" value="crmenglish"/>
  <add key="Language" value="en"/>
</appSettings>
```

Key	Description
path	The (Root-)Path where you want to store the files. In this example in \CRM-DATA\RelatedDocuments\ on the CRM Server.
MSCRMServer	Your CRM Server (root)
Language	This Value is needed to find the right language file (see 1.2.5)

These Values will be set during the Installation for you.

1.2.4 The relateddocuments.xml File

In this File you set the Document Categories. This is very easy and works fully dynamically.



The Xml-File according to this example:

```
<?xml version="1.0" encoding="UTF-16LE" standalone="no"?>
<relateddocuments>
```

```

<relateddocuments_row>
  <id>1</id>
  <category>File Memo</category>
  <description>All File Memos according to this contact.</description>
  <icon>./_imgs/ico_report_1.gif</icon>
</relateddocuments_row>
<relateddocuments_row>
  <id>2</id>
  <category>Auditing</category>
  <description>All annual audits.</description>
  <icon>./_imgs/ico_report_activities.gif</icon>
</relateddocuments_row>
<relateddocuments_row>
  <id>3</id>
  <category>CAT 3</category>
  <description>Description for CAT 3</description>
  <icon>./_imgs/ico_report_activities.gif</icon>
</relateddocuments_row>
</relateddocuments>

```

As you can see we need for each Category an <relateddocument_row> Section

```

<relateddocuments_row>
  <id>1</id>
  <category>File Memo</category>
  <description>All File Memos according to this contact.</description>
  <icon>./_imgs/ico_report_1.gif</icon>
</relateddocuments_row>

```

<id>	a unique ID. This ID is also the name of the directory on the Server!
<category>	The logical Name of the Category
<description>	The description under the Category
<icon>	The Icon for the Category

You can build as many Categories as you want . On every call of the RD-Page the System will check the Directories. If something changed the system will create them. (If you delete some existing Categories the System will not delete them!)

This also means that if you change the Xml-File and save it the user automatically will see it!

This categories are available for all entities.

1.2.5 Define categories for specific entity

Above is described how it is possible to define categories which are for all entities.

Now we want to show how to define categories for a specific entity(account,contact,..)

```

<!-- Additional folders for leads -->
<leads_cat>
  <id>Lead Letters</id>
  <category>Lead Letters</category>
  <description>All letters of the lead.</description>
  <icon>./_imgs/ico_report_1.gif</icon>
</leads_cat>
<!-- Additional folders for contacts -->
<contacts_cat/>
<!-- Additional folders for accounts -->
<accounts_cat>
  <id>Account Letters</id>
  <category>Account Letters</category>
  <description>All letters of the account.</description>
  <icon>./_imgs/ico_report_1.gif</icon>
</accounts_cat>
<accounts_cat>
  <id>Contracts</id>
  <category>Contracts</category>
  <description>All contracts of the account.</description>
  <icon>./_imgs/ico_report_1.gif</icon>
</accounts_cat>
<!-- Additional folders for opportunities -->
<opportunities_cat/>

```

This example will add for the entity **lead** the category **Lead Letter** and for the entity **account** the categories **Account Letters** and **Contracts**.

So this example shows you how it is possible to add one or more categories for a specific entity.

1.2.6 Define the name of the created directory

The RelatedDocuments add-on creates for each category a directory on the defined share(web.config). It is possible to define the name.

```
<!-- Lead Folder Name-Prefix -->
<lead>
  <Columnname>subject</Columnname>
</lead>
<!-- Contact Folder Name-Prefix -->
<contact>
  <Columnname>lastname</Columnname>
</contact>
<contact>
  <Columnname>firstname</Columnname>
</contact>
<!-- Account Folder Name-Prefix -->
<account>
  <Columnname>name</Columnname>
</account>
<!-- Opportunity Folder Name-Prefix -->
<opportunity>
  <Columnname>name</Columnname>
</opportunity>
```

This xml entries defines the prefix of the directory-names. For example a contact directory looks then like this:

Peter McDonald {9D747584-9948-4AFC-81E9-7B2AA10F6F61}

If this entries are not in the relateddocuments.xml the directories have only the unique number of the entity and looks like this:

{9D747584-9948-4AFC-81E9-7B2AA10F6F61}

So with the above entries the directory are accessable to other users that are not using ms crm and they will find what they are searching thru the directoryname.

As columnname you can take every column which is defined in MS CRM. If you need help please contact support@mscrm-addons.com

1.2.7 Define different locations to store the files

You can define for account,contact,leads and opportunities different shared folders to store the files.

Generally all documents will be stored in the directory/share you defined in the web.config. If you want for example to store the accounts in a different directory and the contacts you have to define this in the relateddocuments.xml

```
<!-- Share for Accounts -->
<account_share>
```

```

        <share></share>
    </account_share>
    <!-- Share for Contact -->
    <contact_share>
        <share>\\server\CRM-DATA\Contacts\</share>
    </contact_share>
    <!-- Share for leads -->
    <leads_share>
        <share></share>
    </leads_share>
    <!-- Share for Opportunity -->
    <opportunity_share>
        <share></share>
    </opportunity_share>

```

In this example all related documents are stored in the directory defined in the web.config. With the only exception that the contacts are stored in the directory \\server\CRM-Data\Contacts

1.2.8 Set up your Language

In ..\RelatedDocuments\localization you will find an **en.xml** (for English) and a **de.xml** (for German) File. Because RD is fully dynamically it needs a File where the text of each Label is set. So this is an easy Way to change the Language. You can create a Language.xml File for each Language you need.

```

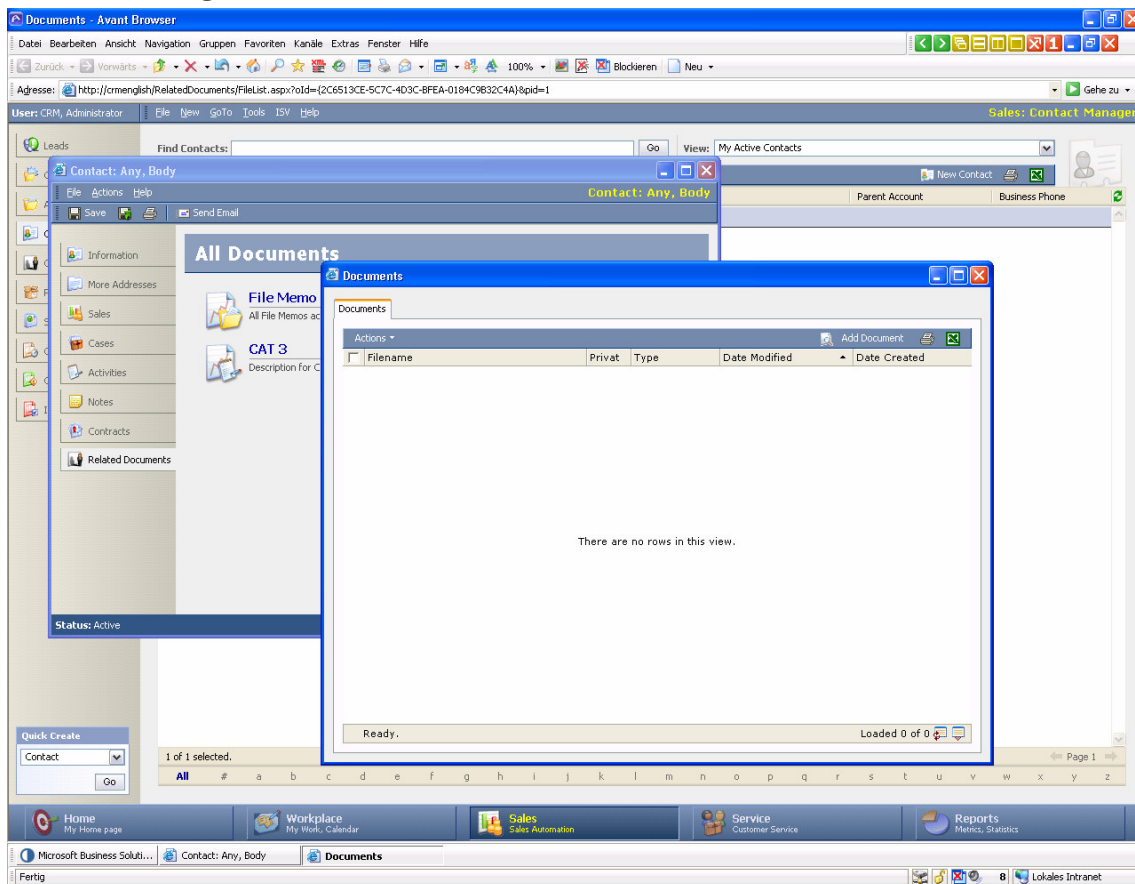
<?xml version="1.0" standalone="yes"?>
<DSLlanguage xmlns="http://tempuri.org/DSLlanguage.xsd">
    <LabelValues>
        <name>lb_markprivat</name>
        <value>Set as private</value>
    </LabelValues>
    <LabelValues>
        <name>lb_markpublic</name>
        <value>Set as public</value>
    </LabelValues>
    <LabelValues>
        <name>lb_delete</name>
        <value>Delete</value>
    </LabelValues>
    .
    .
    .
</DSLlanguage>

```

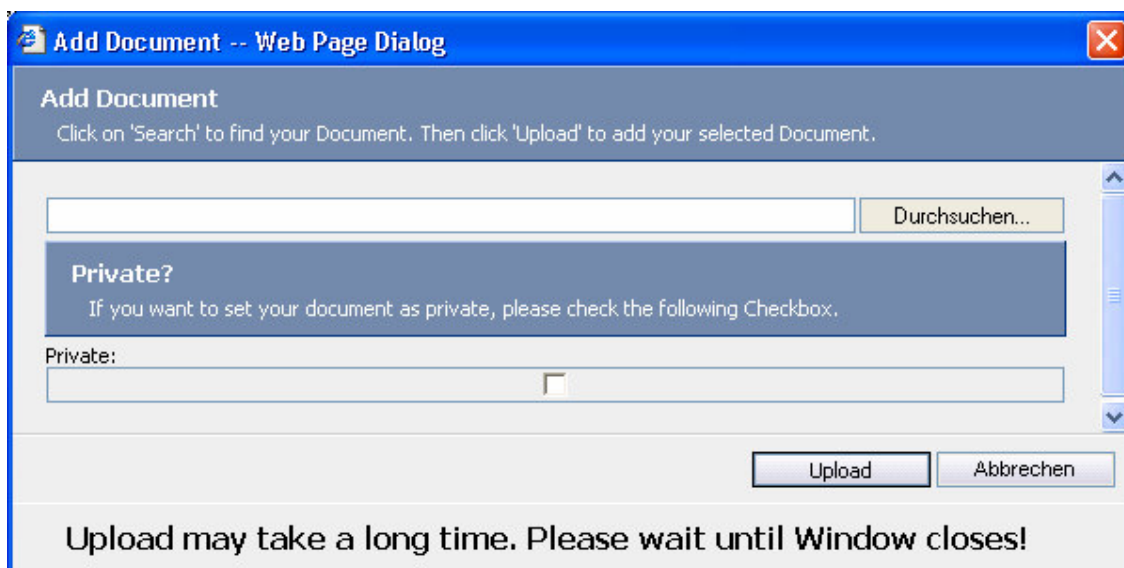
You should only change the <value> value!
Do not change the number of <LabelValues> Section or something else!

By the Way there is no need to change the Values in this File. If you want to do so and for more Information please contact us.

1.3 Working with it



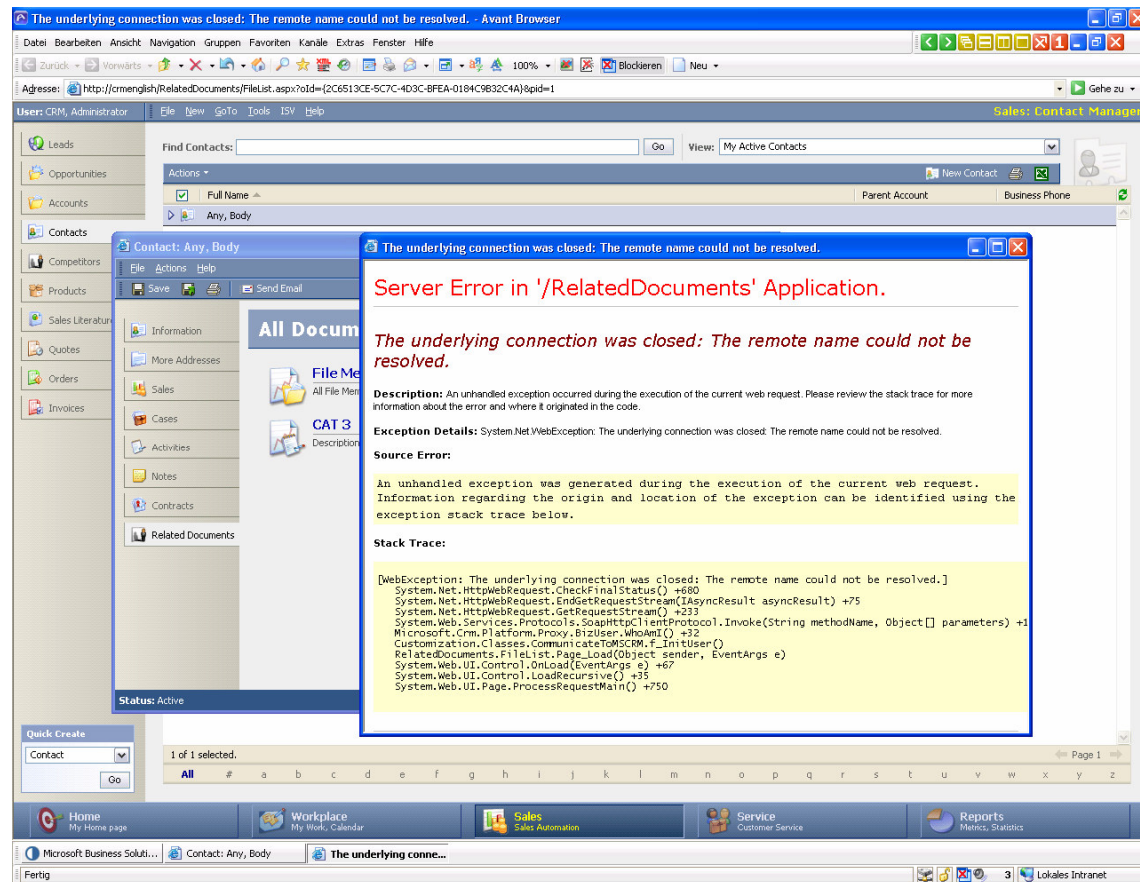
After you selected a Category you will see a List of Documents. To Add a Document simply click on <Add Document>.



1.3.1 What does Private means?

If you check a Document as Private only you will be able to see it.

1.4 Errors



Please check the "MSCRMServer" Entry if you typed in the correct CRM-Servername.

1.5 Support - Contact

Please use the following E-Mail.

support@mscrm-addons.com