PowerSearch for MS CRM 4.0

Version 4.0

Implementation Guide
(How to install/uninstall)

Table of Contents

Common Information:

Before installing PowerSearch for MS CRM 4, please read this document and follow the steps carefully.

Intended Audience
This guide is intended for system administrators who are familiar with the following administrative tasks:

Maintaining and configuring SQL Server databases
Maintaining and configuring IIS based Web Sites / Applications
Maintaining and configuring a Microsoft CRM Server

The installation consists of the following steps:
Follow each of the following steps, to complete the installation:

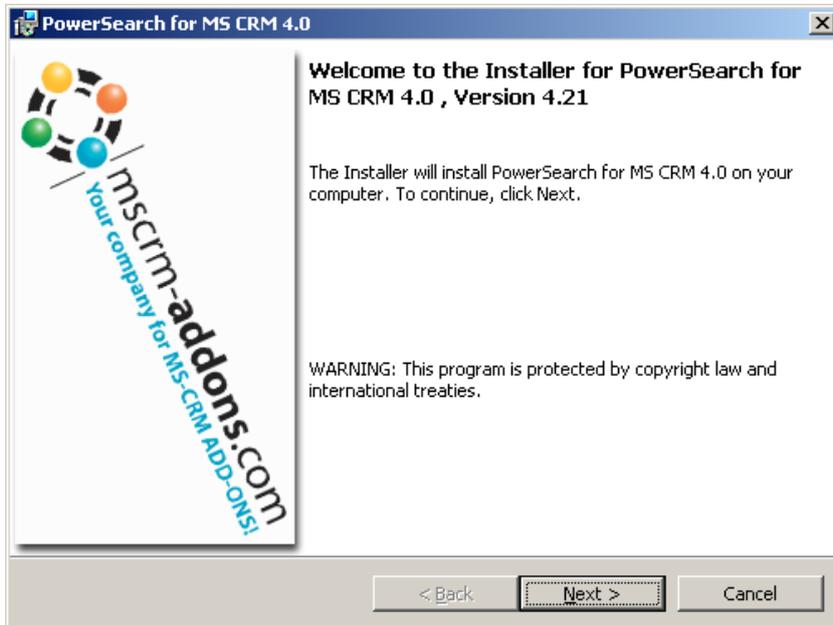1. Installing PowerSearch for MS CRM 4.
2. Configuring the Search –criteria

1. Installation

You have to install the Add-On on your MS CRM Server.

1. Intro

Run the Power Search for MS CRM 4 Setup file.
The following window will appear:

Click [Next] to proceed.

INFORMATION: If an upgrade is detected, a message will be shown and the setup will go to [5] directly after accepting the EULA [1]
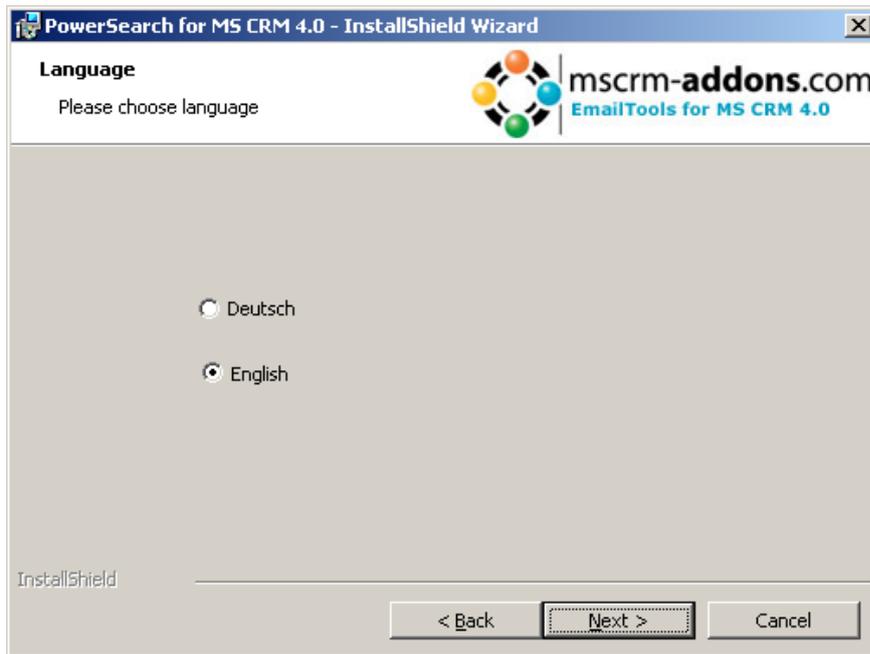
1. EULA (End User License Agreement)
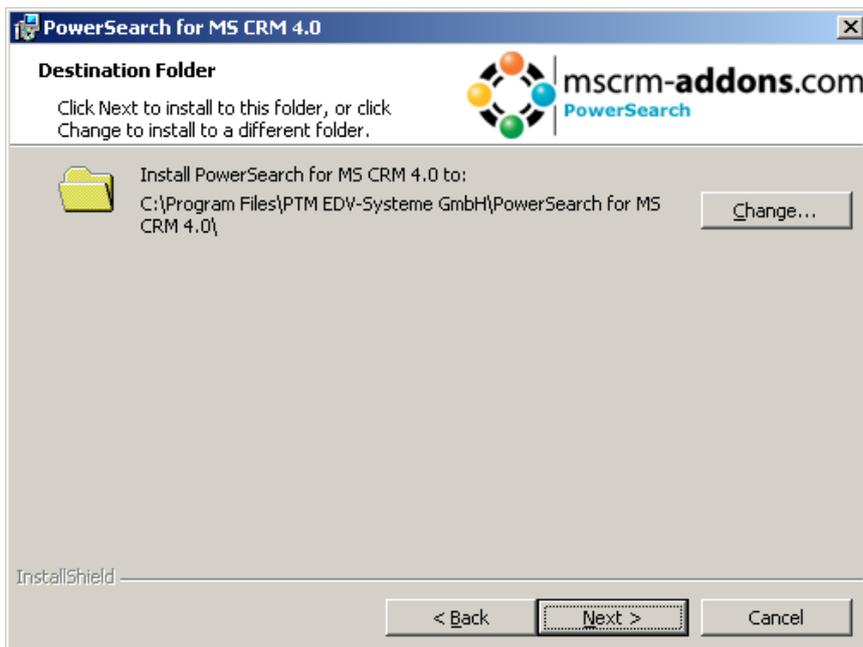

Click [Next] to proceed.

2. Language Selection

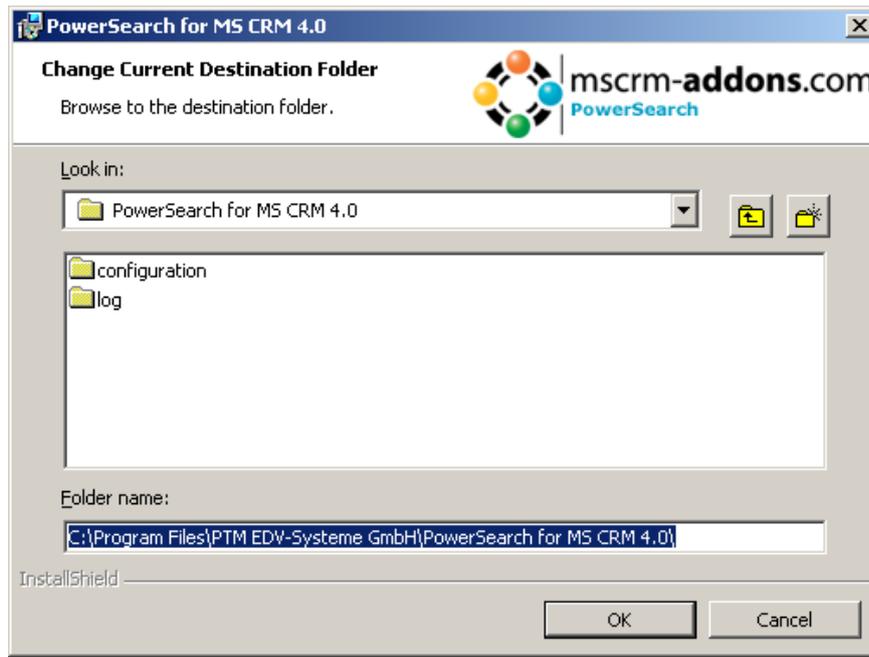Choose your preferred language and proceed with a click on [Next]

3. Folder Selection

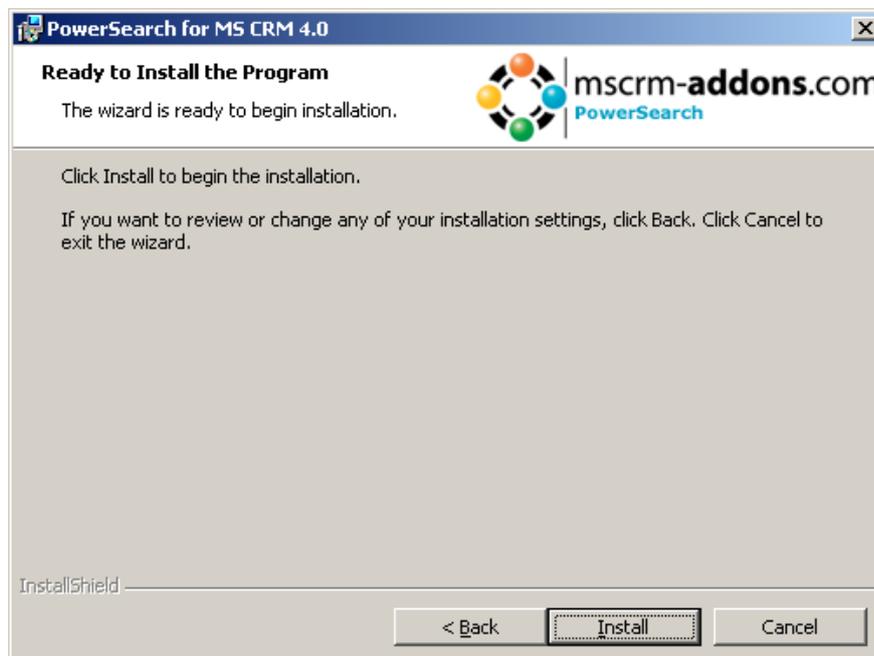Here it's possible to set the installation directory

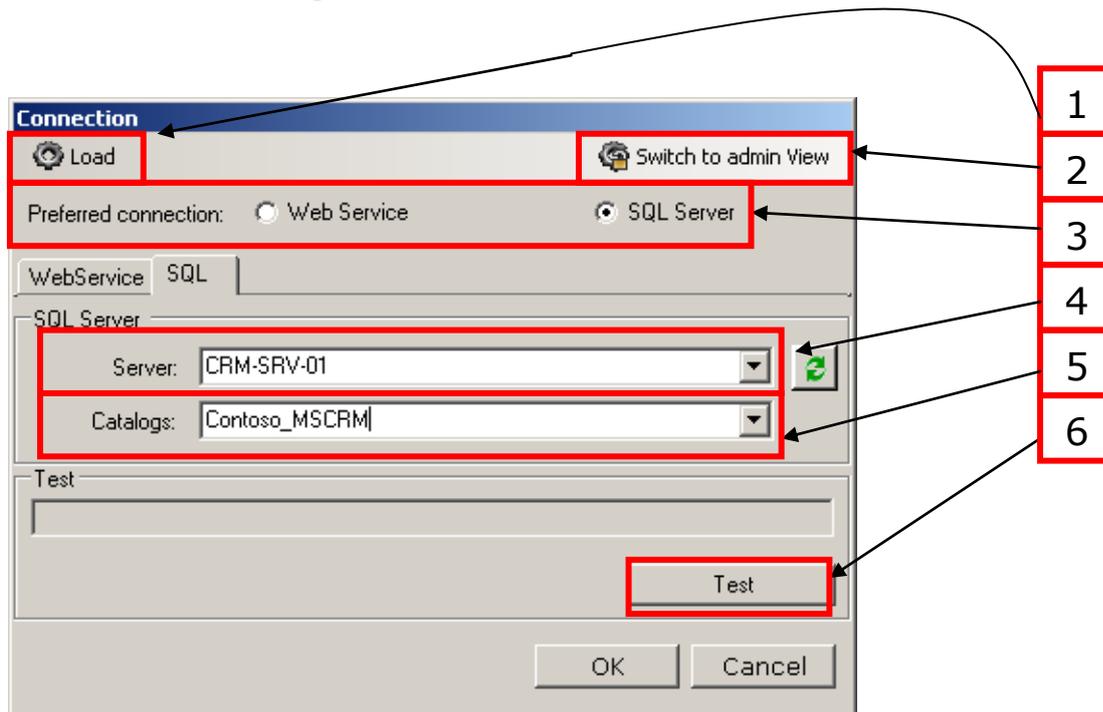Click [Change] to specify the installation path.

Click [Next] to proceed.

4. **Confirm Installation**

To start the installation, click on [Install].
To change the settings, click on [Back].

Connection-Dialog

1. <u>Load</u>
Allows you to load saved profiles.

2. <u>Switch to admin View</u>
Here you switch to admin View.

3. <u>Preferred connection</u>
Here you can choose between "Web Service" and "SQL Server".

4. <u>Server</u>
Here you have to enter the SQL-servername.

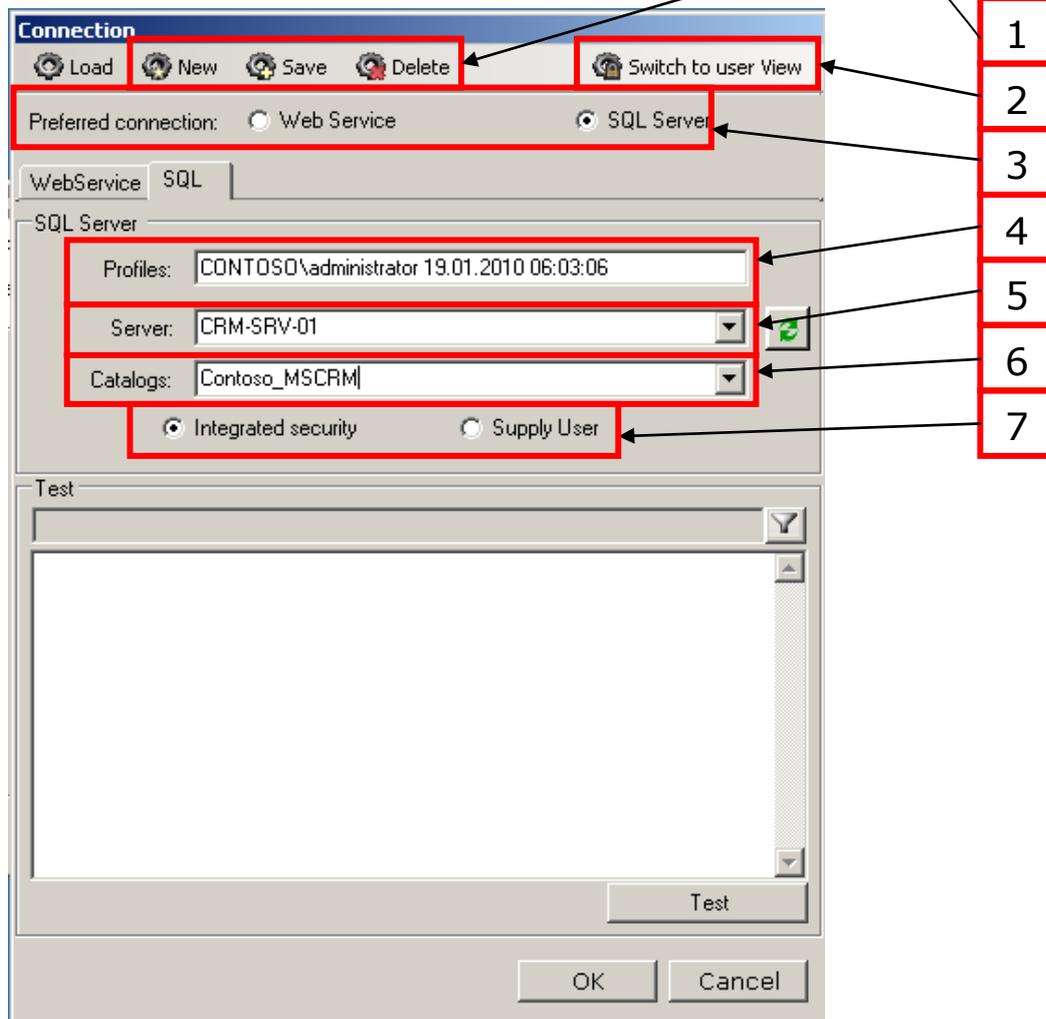**5. <u>Catalogs</u>**
Here you have to enter a name for the catalog or click on the [Arrow-down] button and the available catalogs will appear.

6. <u>Test</u>
Before you click "OK" you should check the connection.

Connection-Dialog (Admin View)

1. New, Save, Delete
Allows you to create, save and delete profiles.

2. Switch to user View
Here you switch to user View.

3. Preferred connection
Here you can choose between between "Web Service" and "SQL Server".

4. Profile
Here, the profile is indicated.

5. Server
Here you have to enter the SQL-servername

6. Catalogs
Here you have to enter a name for the catalog or click on the [Arrow-down] button and the available catalogs will appear.

7. Integrated Security – Supply User
Here you can choose to supply a user or use integrated security.

5. Progress

After the installation, the website is created and the files are copied. This could possibly take a while. you will see following screen for a while:
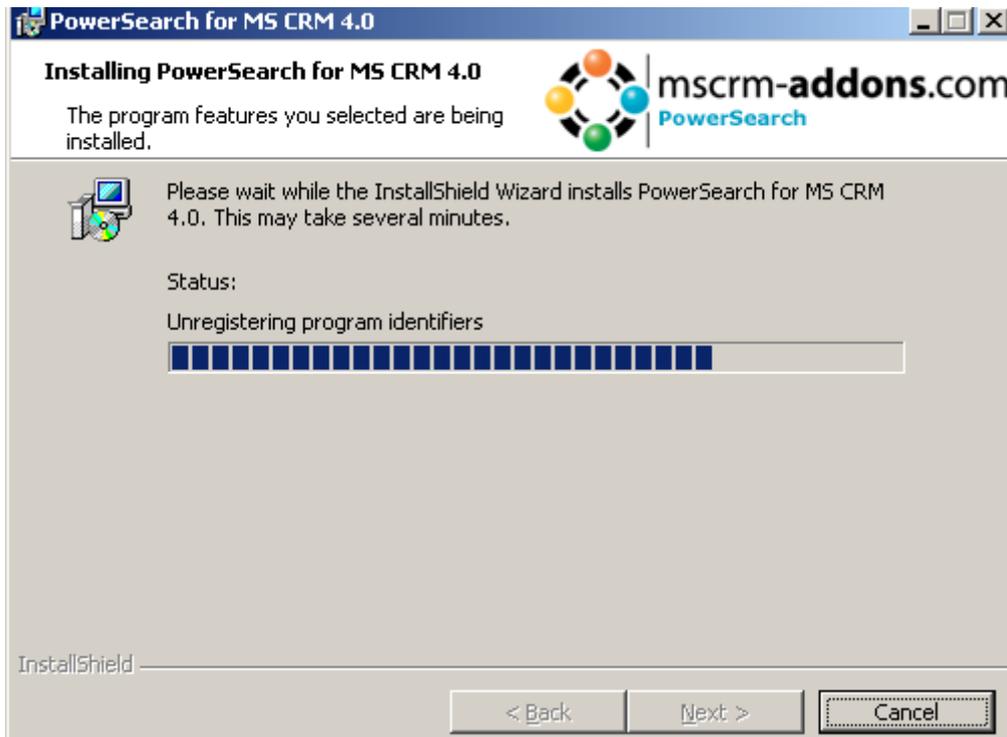
You will be asked if you want to start the index service which is needed for document search. It may take a few minutes if a lot of documents have been saved within MS CRM.

Depending on the number of documents saved, this procedure can take a few minutes. You will see following window after starting the service:
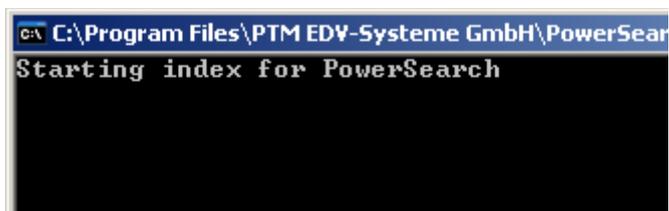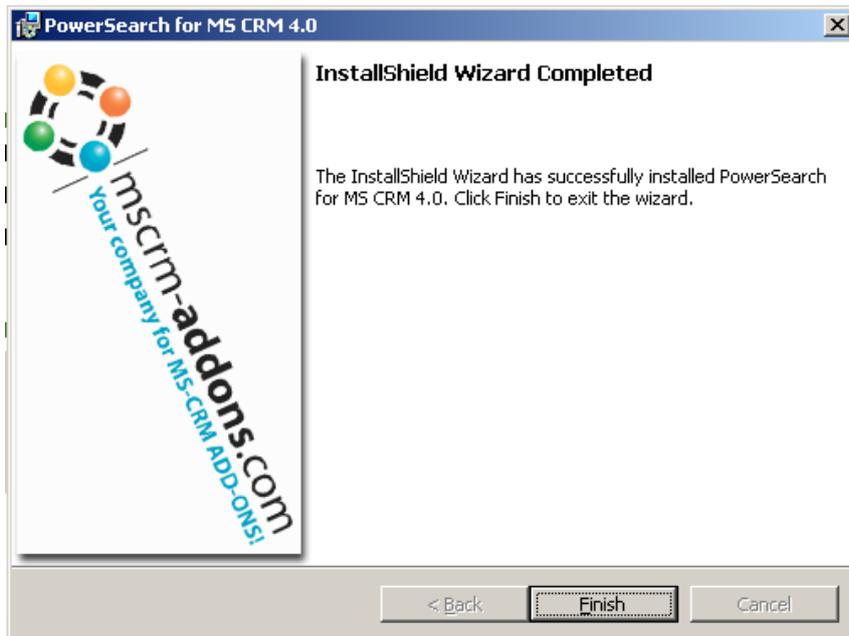

6. Configuration

Now the Configuration Tool will automatically start.
For a detailed description, please go to [Fehler! Verweisquelle konnte nicht gefunden erden.]

7. Finish

When the setup has finished successfully, you will see the following screen:

A new entry has been created in the sitemap.
You will see a new menu item under "Workspace" in CRM called "Power Search".

1. Configuration

The PowerSearch for MS CRM 4.0 configuration allows you to specify entities you want to use for searching.
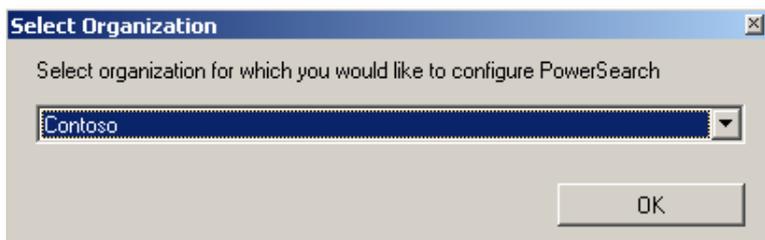
Basically the setup consists of two forms:

1. The main setup form which allows you to specify the entities

2. The fields form which allows you to specify search and result attributes.

When you start the Tool you will see following loading screen:

Then you will have to choose an organization:

1. The main setup form:

In the Data window, all available entities are listed.
All entities you select will show up in the entity-toolbar in CRM.

If you select one entity, a new button "fields" will appear which allows you to open a new dialogue where it's possible to define the attributes used. (see chapter 1.2)

Please click on the [OK] button to save the settings to the config entity.
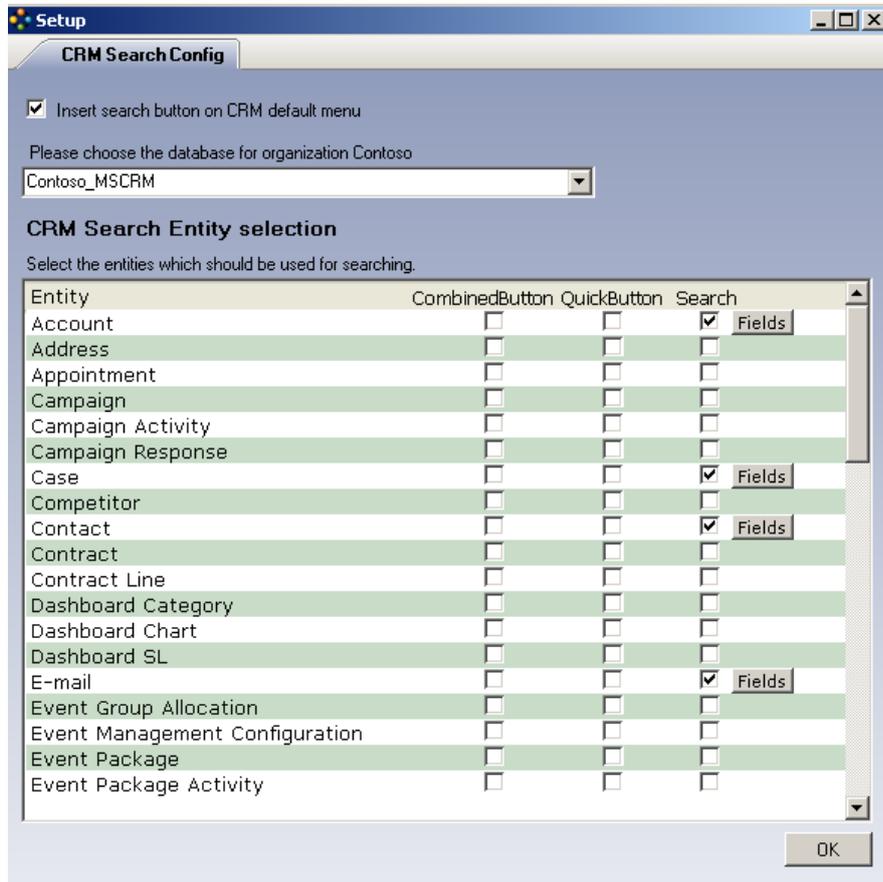
CombinedButton: Adds a button to the configured grid views of CRM and allows you to limit the combined search to either search within all records or to just search within the selected records in the grid view.

QuickButton: Creates a PowerSearch-button in the Nav-area.

Insert search button on CRM default menu:

If you click on the PowerSearch button, a textbox appears.

2. The fields form:

Here you can set the attributes in which the search routine will run the search and that will show a result if a record is found.

Please note, that checking a lot of "Search" fields will result in more hits, but also decrease performance. Further on it's possible to set the values for status-codes that will count as "Active" for a search via the checkbox-list at the bottom.
All available status-codes are listed. Double click on the item to check.

e.g.: Entity Lead, here we have 7 different states and we want to find qualified, new and contacted leads

Click [OK] to accept the settings.

3. Indexservice – configuration

To keep the index of the documents saved in CRM up to date, a new scheduled task which triggers the Index service has been created by the setup routine.
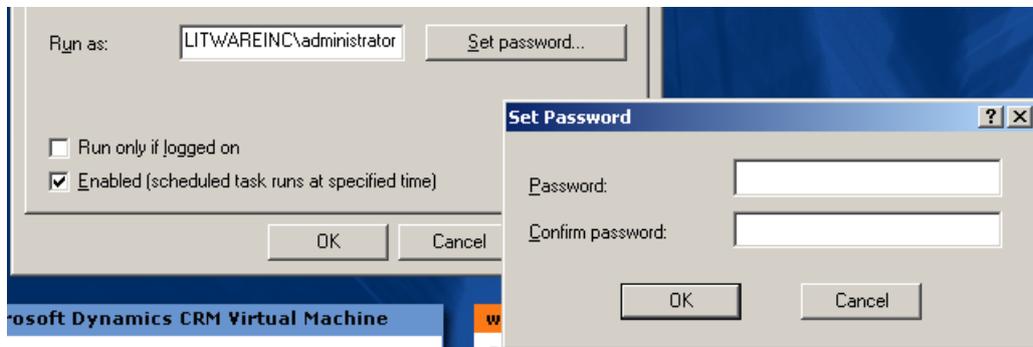
You can configure the task under Control Panel->Scheduled Tasks-> PSIndexUpdateService.
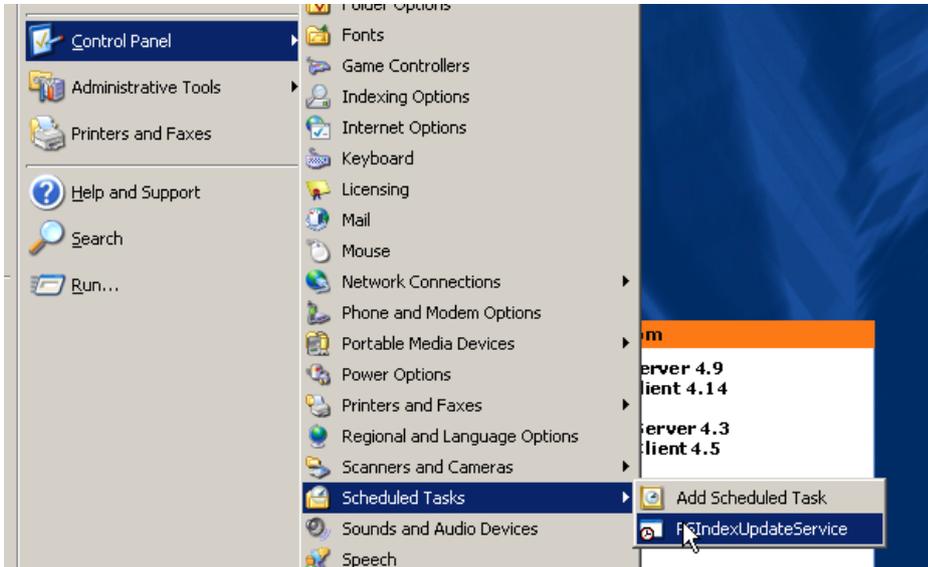
The task runs every 15 minutes in the context of the user, that installed Powersearch.

IMPORTANT: The password has to be set in order to run the process if the user is logged off!
Here you have to specify a CRM user with full access rights.

4. Adobe IFilter
 You can download the Adobe IFilter HERE.
 You will find more information about the Adobe IFilter on the Adobe website.

5. PowerSearch-Main Form

Open the search-routine from the Workspace in your CRM-System.
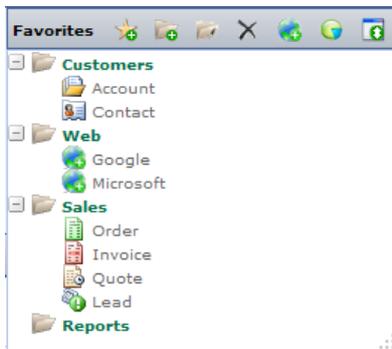
1. Entity selection

Here it's possible to define the entities which should be used in your search.

Selected entities are highlighted.

2. Favorites

The favorites provide a possibility to compile your favorites and to make them accessible within the search routine. The result will show up instead of the search-results on the main page.
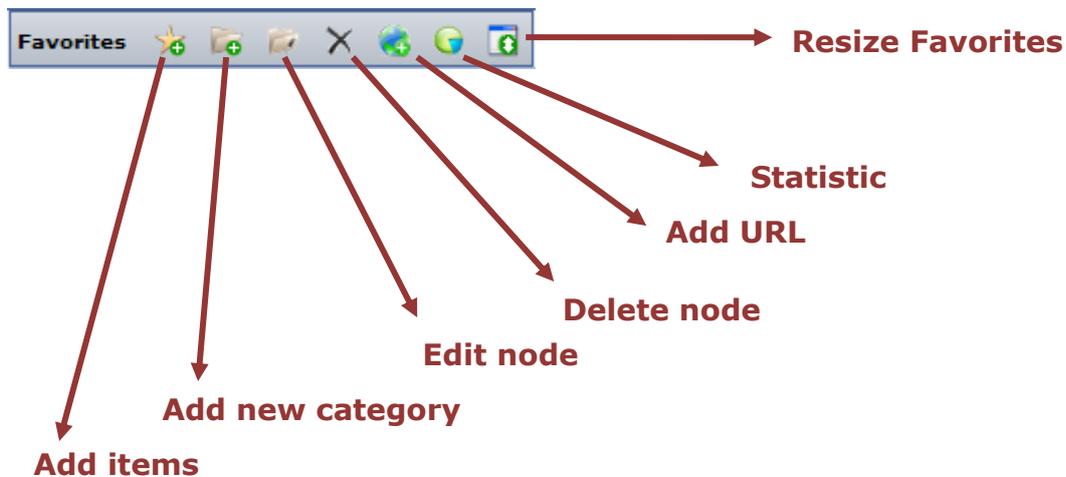

It is possible to add:
- Entity overviews: Show up the main entity – search form from CRM
- Advanced search: Shows the results of predefined Advanced Searches
- URL's: Shows a specified URL

How to edit your favorites

The Favorites menu provides following possibilities:

Resize Favorites

Statistic

Add URL

Delete node

Edit node

Add new category

Add items

1. Add Items:

It's possible to add two types of entries to the favorites
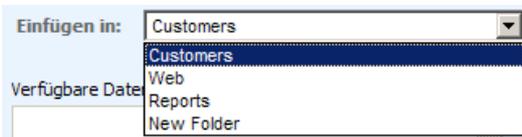a. Entities: provide an entity overview
b. Predefined advanced searches

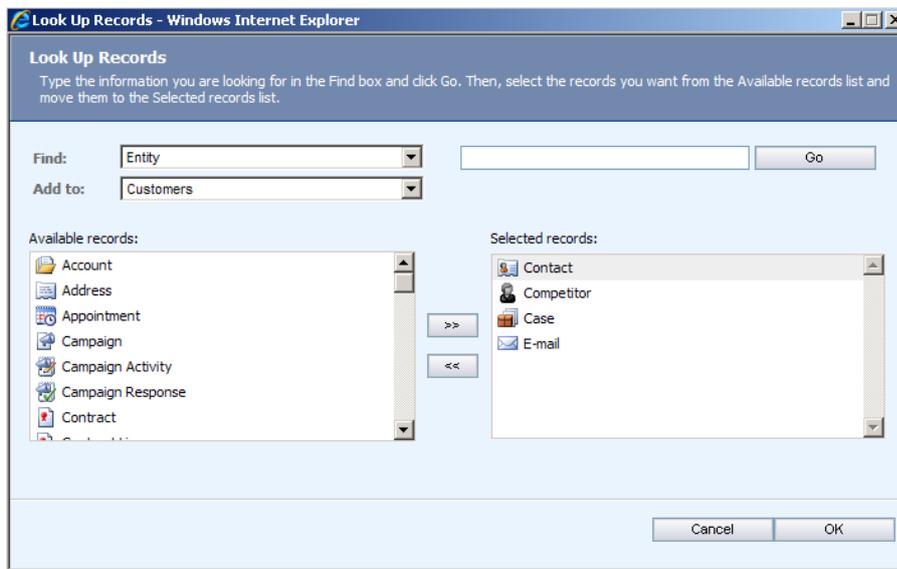With a click following window appears:

You can choose the type with the 1st drop-down-listbox:
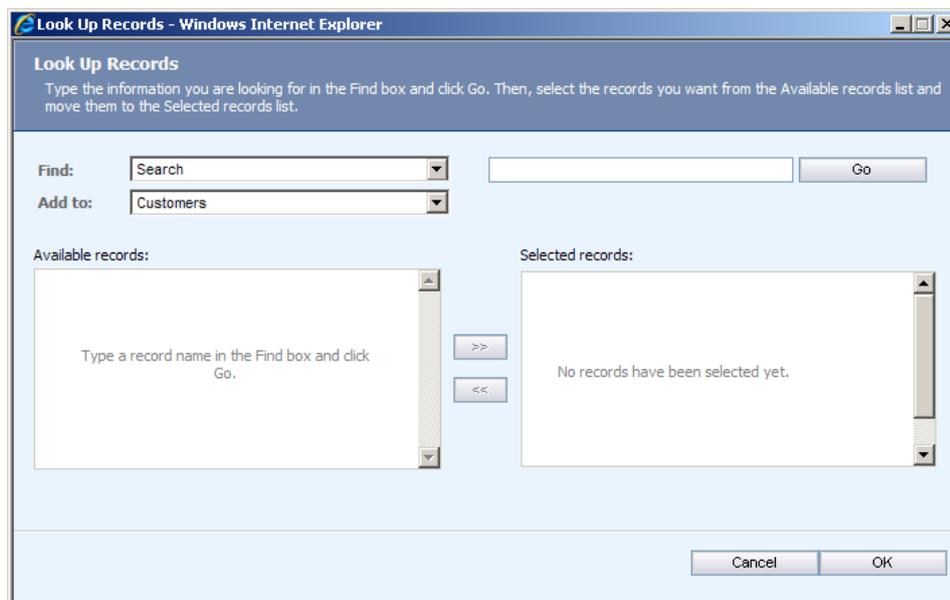
You can choose the type with the 1st drop-down-listbox:

You can specify the category to which you want to add the favorites with the 2nd drop-down-listbox:
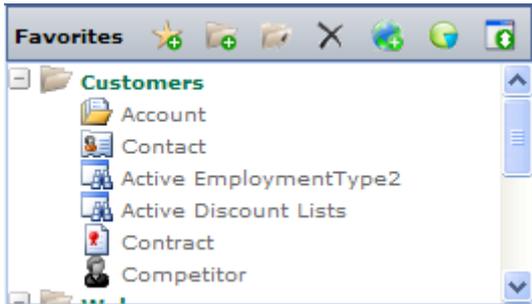

If you choose the type "Entity" all entities will appear in the left listbox, you can add select them with a click on [>>].

Basically it's the same for Advances Searches. Additionally it's possible to search for them:
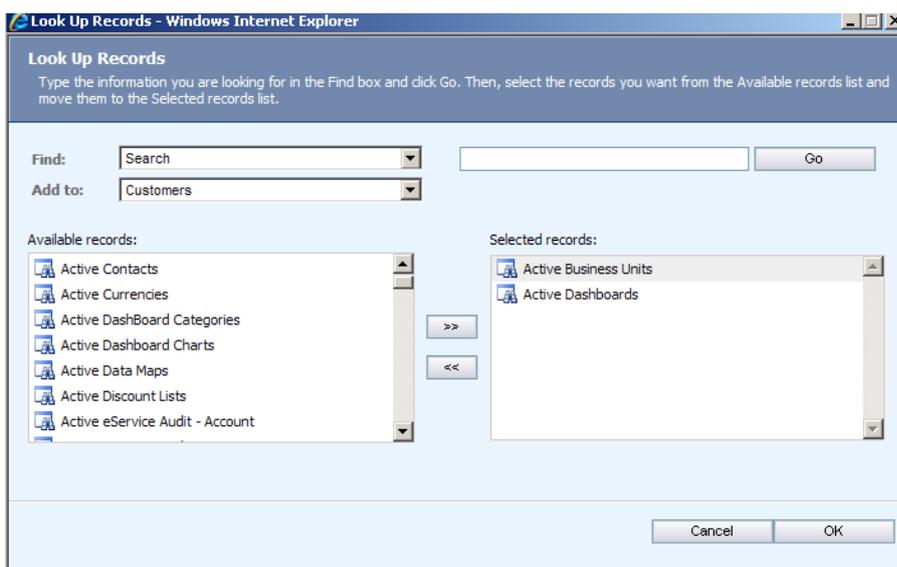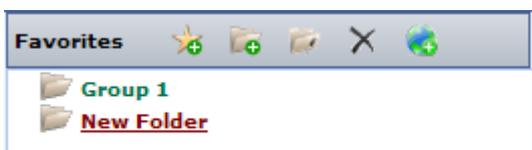
All chosen entries will be added to the favorites -menu on the right top-corner afterwards:

2. **Add new category:**

With a click a new folder named "New Folder" will appear in the tree. This folder could be used to add items afterwards.

3. **Edit node:**

With a click following window comes up:

Here it`s possible to rename the selected node (Category or entry).
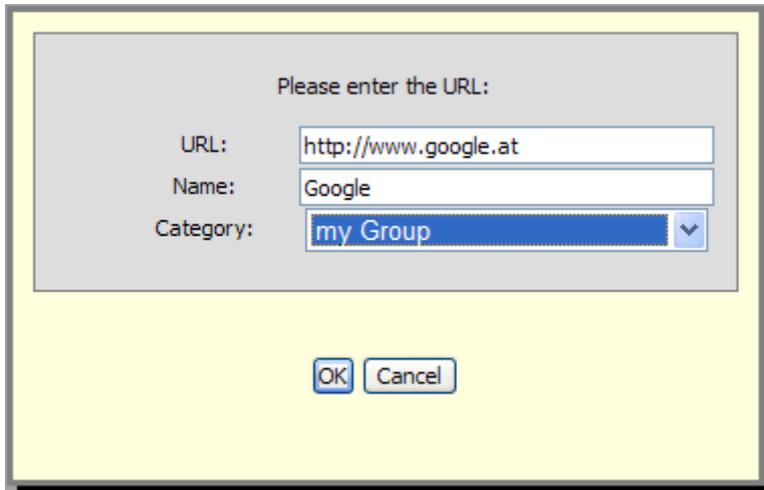
4. **Delete node:**

Deletes the selected node from the Favorites

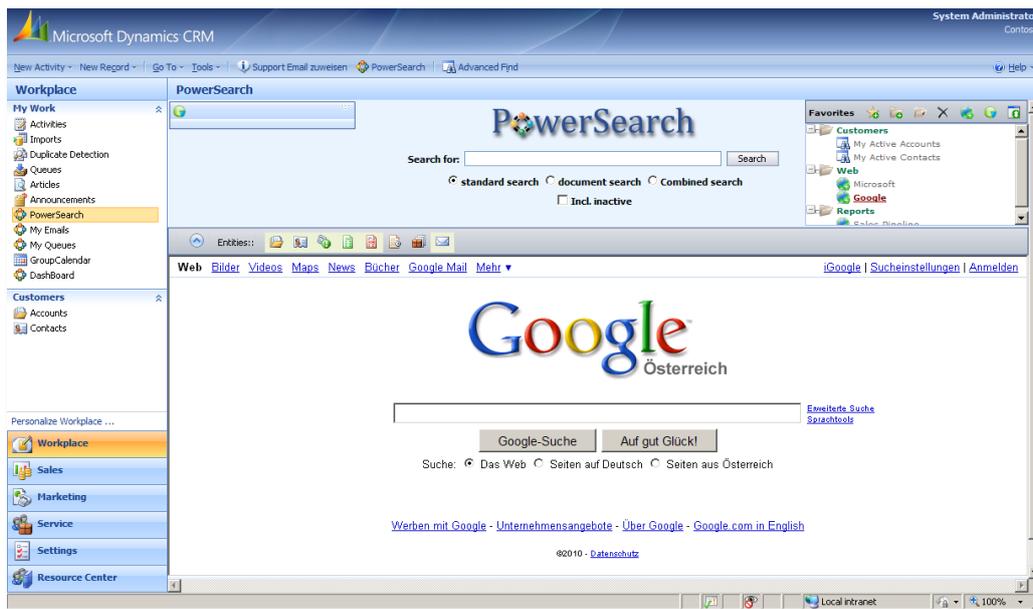## 5. Add URL:

Here it's possible to define URLs that should show up within the PowerSearch form.

With a click, following window appears:

Afterwards a new node with the URL will show up in the tree and therefore can be accessed with PowerSearch:

6. <u>Statistic:</u>

Here it's possible to select the statistic graph, which should be presented in the statistic – sector on the main form afterwards.
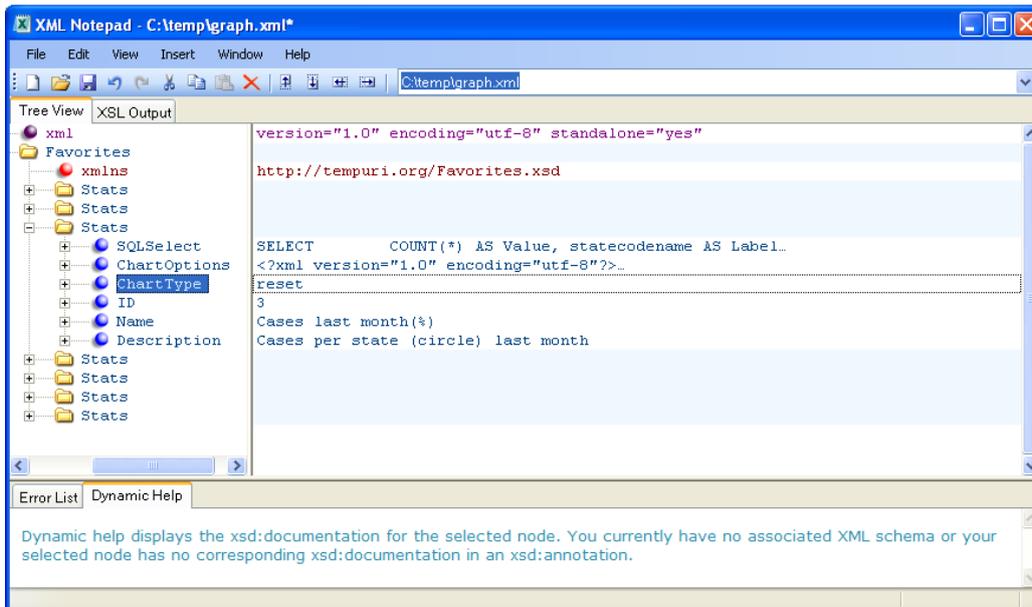
On click, following window appears:

Here it's possible to select a statistic from the list.

<u>Add statistic</u>: (**for enhanced users**)

This option requires XML and SQL- knowledge.

Basically statistics are defined in the graph.xml in the config-folder of PowerSearch for MS CRM 4.0.
(Edited with XML Notepad 2007 - available for free on www.microsoft.com)

Here you can see a "stats"- node for every statistic.
It consists of 6 config-entries:

- SQLSelect: Here the SQL-select which returns the data you want to show up has to be configured. E.g (cases of last month)
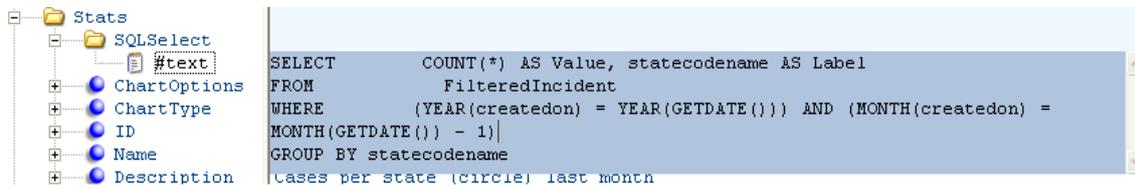
- ChartOptions: if you want to have a new chart, please send a request to support@mscrm-addons.com . We will take a look on this afterwards

- ID: Unique identifier of the chart
- Name: Name of the statistic. This name shows up in the listbox afterwards.
- Description: Description of the statistic. Shows up at the bottom of the statistic in the SelectStat.aspx.

For detailed information please contact our support- team.

7. Resize: Enlarges the Favorites window

6. Contact

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