

AvePoint SearchAll 3.0.2 for Microsoft Dynamics® CRM

Installation and Configuration Guide

**Revision C
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Overview

SearchAll for Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM 2011 enables users to quickly find entity records by using a keyword search. Information within entity records that meets the searched keywords are displayed in the search results. Entities and information within columns are only searchable if configured in the SearchAll settings.

Before you begin using the SearchAll solution, you must import the solution to Dynamics CRM, apply the security roles to the user who will use this solution, apply the license to this solution, and configure the basic settings. Refer to the sections below for instructions.

Before You Begin

Obtain the **AvePoint_SearchAll_for_Dynamics_CRM_Serial_Number.zip** file from an AvePoint representative.

Supported and Unsupported Web Browsers

Before you begin to import and configure the SearchAll settings, refer to the table below for detailed information of supported and unsupported Web browsers for SearchAll when using Dynamics CRM Online:

Web Browser	Support Status
Internet Explorer 8	Supported
Internet Explorer 9	Supported
Internet Explorer 10	Supported
Google Chrome	Supported
Firefox	Supported
Safari	Unsupported

Importing the SearchAll Solution

The SearchAll solution must first be imported into Dynamics CRM before any of its functionalities can be leveraged. Follow the steps below to import the SearchAll solution into Microsoft Dynamics CRM 2013/2011.

1. Log into Microsoft Dynamics CRM and navigate to **Settings > Customization > Solutions**.
2. Click **Import** to import the solution (as shown in the screenshot below). The **Select Solution Package** page appears.

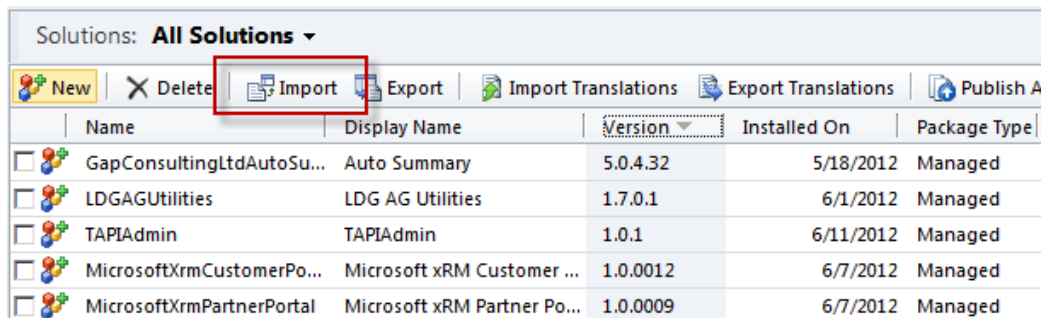
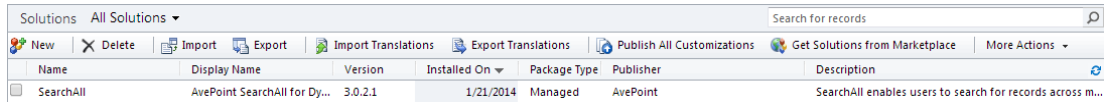


Figure 1: Importing the solution (Dynamics CRM 2011 environment shown).

3. In the **Select Solution Package** page, click **Browse** and select the **AvePoint_SearchAll_for_Dynamics_CRM_Serial_Number.zip** file that contains the solution. And then click **Next**.
4. View the solution's information on the **Solution Information** page to verify the solution **Name**, **Publisher**, and **Package Type**.
5. If desired, you can view the details of the package:
 - a. Click **View solution package details** for more details.
 - **Solution Details** – Displays the version, package type, and so on.
 - **Publisher Details** – Displays the publisher information.
 - **Solution Components** – Displays the components that will be imported.
 - b. Click **Close** to return to the **Solution Information** page.
 - c. Click **Next** to continue.
6. To complete the import process, select the **Activate any processes and enable any SDK message processing steps included in the solution** checkbox.

***Note:** If the above checkbox is not selected, then the steps to install the plug-in will not be activated and the process cannot be completed.
7. Click **Next** and wait for the operation to complete.
8. After the solution imports successfully, click **Close** to close the **Importing Solution** page.

9. Verify that SearchAll is displayed in the **All Solutions** list.



The screenshot shows the 'All Solutions' list in Dynamics CRM 2011. The table contains the following data:

Name	Display Name	Version	Installed On	Package Type	Publisher	Description
SearchAll	AvePoint SearchAll for Dy...	3.0.2.1	1/21/2014	Managed	AvePoint	SearchAll enables users to search for records across m...

Figure 2: Verifying that the solution is displayed in the All Solutions list (Dynamics CRM 2011 environment shown).

Applying Security Roles to Users

In order to leverage the SearchAll functions, the user's security roles must first be configured. Only users who have the required permissions can use the SearchAll solution. Follow the steps below to apply the required security roles to users that will be using the SearchAll solution.

1. Log into Dynamics CRM as a user with administrative access.
2. Navigate to **Settings > System > Administration > Users** and click the user that will use the SearchAll solution.

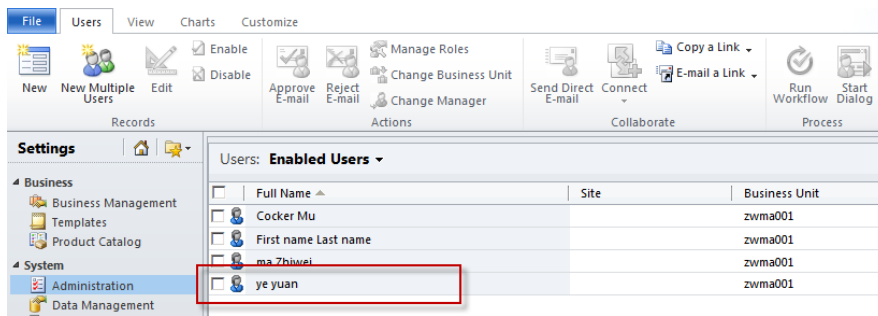


Figure 3: Selecting a user to configure security roles (Dynamics CRM 2011 environment shown).

3. On the pop-up window, navigate to **Common > Security Roles** and then click **Manage Roles**.



Figure 4: Clicking Manage Roles (Dynamics CRM 2011 environment shown).

4. On the **Manage User Roles** pop-up window, select the roles that you want to apply to the user.
 - **SearchAll User** – Users with this security role applied will be able to perform Global Search and Local Search. The user with this security role cannot see the **SearchAll Settings** and **Product Registration** buttons on the SearchAll user interface.
 - **System Administrator** – Users with this security role applied will be able to register the product, configure the **SearchAll Settings**, and perform Global Search and Local Search.

***Note:** Users who have not had any security roles applied do not have access to this solution.

5. Click **OK** to save the settings and security roles are applied to this user.
6. Repeat steps 2 through 5 for each additional user.

Applying a License

SearchAll provides a built-in license which enables you to freely use SearchAll 30 for days. After the 30-day trial period, you must apply a new license to continue using SearchAll.

To apply a license, complete the following steps:

1. Use the user that applied the **System Administrator** security role to log into Dynamics CRM and navigate to **Workplace > My Work > SearchAll**.
2. On the **AvePoint SearchAll for Dynamics CRM** interface, click **Product Registration** and the **SearchAll Registration** page appears.



Figure 5: Clicking Product Registration (Dynamics CRM 2011 environment shown).

3. Open the license file using Notepad and copy all contents within it into the blank text box on the **SearchAll Registration** interface.
4. Click **Apply**. The **SearchAll License Agreement** page appears.
5. Read the license agreement carefully and select **I accept the terms in the license agreement**. Click **Next** to apply the license.
6. After the license has been applied successfully, the license information will be displayed in the Current License Information area.
 - **Product** – The product information that the license is applied to.
 - **License Type** – There are two license types:
 - **Demo**– The demo license is for your trial and a demo license limits the validity period.
 - **Enterprise**– The formal license to register the product. The account numbers and the validity period in this license are according to your purchase.
 - **Number of Licenses** – The maximum number of the users that are able to use the solution meanwhile.
 - **Organization GUID** – The GUID of the organization that has installed SearchAll, which is used to limit the organizations that can register the solution.
 - **Validity Period** – The validity period that you can use SearchAll.

Configuring SearchAll Settings

Before you can use the SearchAll solution, you must configure the SearchAll settings. Without configuring the settings, the following message displays on the **AvePoint SearchAll for Dynamics CRM** interface: **SearchAll Settings must be configured in order to proceed.**

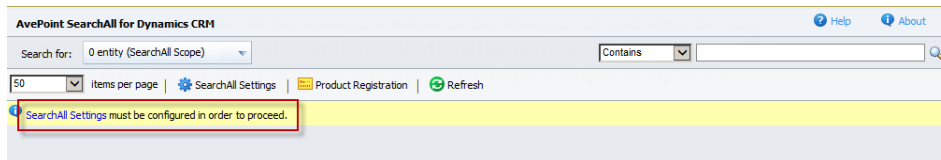


Figure 6: A message displays to inform you that the settings must be configured (Dynamics CRM 2011 environment shown).

To configure SearchAll settings, you must log in as a user who has the **System Administrator** security role.

Click **SearchAll Settings** to configure SearchAll settings that have the following functions:

- Manage the entities that are displayed in the **Search for** list, which is used to specify the entity scope of searching information from Dynamics CRM content database.
- Specify the columns that are allowed to display their content in the search results.
- Specify the columns that are allowed to search its content.
- Select the status to specify which entity records are able to be displayed in the search result.

On the **SearchAll Settings** page, all current entities are listed in the **SearchAll Entities** list. By default, four entities have been added, including **Accounts**, **Contacts**, **Leads**, and **Opportunities**. The right pane displays the three sections for configuring **Display Columns**, **Search Columns**, and **Search Status**.

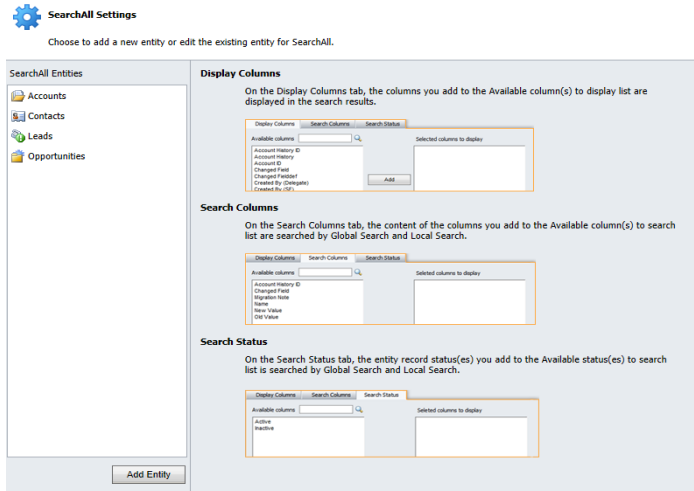



Figure 7: The SearchAll Settings page (Dynamics CRM 2011 environment shown).

- To view the detailed settings for each entity, click the entity and then the detailed settings are displayed on the right pane.
- To add a new entity, click **Add Entity**. For details, refer to [Adding Entities](#).
- To edit an entity, select an existing one in the **SearchAll Entities** list and then edit it on the right pane. For more information, refer to [Editing Entities](#).
- To delete an entity, hover the mouse pointer over the entity in the **SearchAll Entities** list and then click the remove () button.

Adding Entities

Follow the steps below to add a new entity:

1. On the **SearchAll Settings** page, click **Add Entity**. The configuration area appears (as marked in the screenshot below) next to the **SearchAll Entities** list.

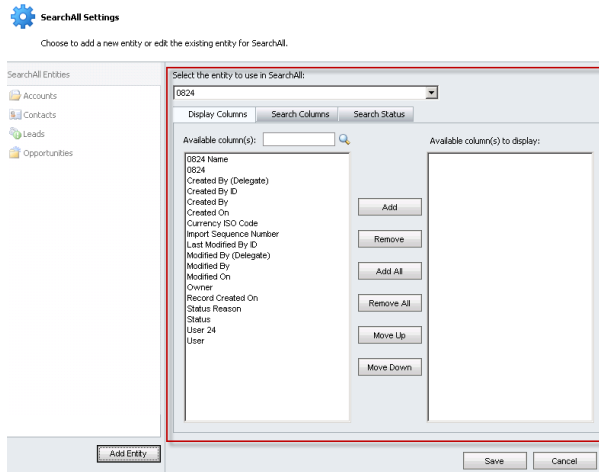


Figure 8: The configuration area appears next to the SearchAll Entities list (Dynamics CRM 2011 environment shown).

2. Select an entity that you want to add from the drop-down list. The available columns of this entity are listed in the **Available column(s)** list.

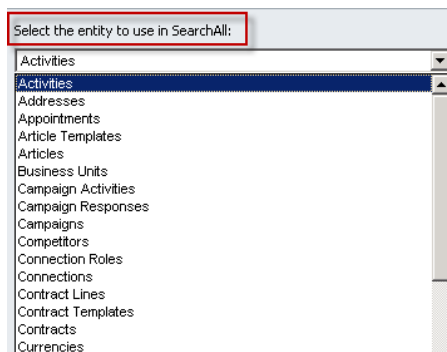


Figure 9: Selecting an entity that you want to add from the drop-down list (Dynamics CRM 2011 environment shown).

3. On the **Display Columns** tab, the columns you add to the **Available column(s) to display** list are able to be displayed in the search results. Select the column from the **Available column(s) list** and then click **Add** to add the column to the **Available column(s) to display** list (as marked in the screenshot below).

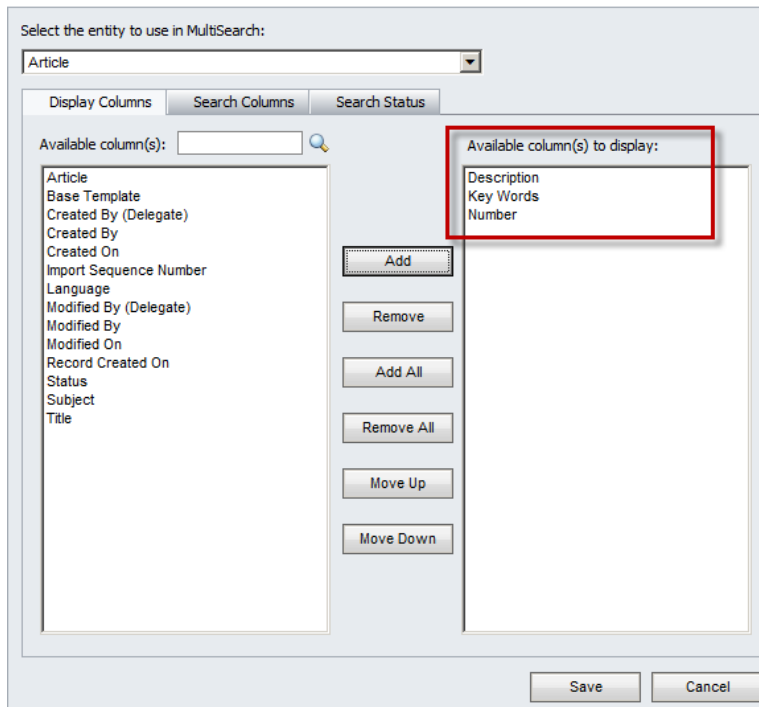


Figure 10: Adding columns (Dynamics CRM 2011 environment shown).

4. You may also perform the following operations:
 - **Remove** – Select a column in the **Available column(s) to display** list and then click **Remove** to move the selected column to the **Available column(s) list**.
 - **Add All** – Click **Add All** to add all columns in the **Available column(s) list** to the **Available column(s) to display** list.
 - **Remove All** – Click **Remove All** to move all columns in the **Available column(s) to display** list to the **Available column(s) list**.
 - **Move Up** and **Move Down** – Select a column in the **Available column(s) to display** list and then click **Move Up** or **Move Down** to adjust the order. The columns listed from the top to the bottom will be displayed from the left to the right in the search results.
 - **Search** – Enter the keyword in the text box next to the **Available column(s)** and click the search (🔍) button to quickly find the columns that contain the keyword. Clear the content in the text box and click the search (🔍) button to display all columns of the entity.
5. On the **Search Columns** tab, the content of the columns you add to the **Available column(s) to search** list can be searched by **Global Search** and **Local Search**. Select the columns from the **Available column(s) list** and then click **Add** to add the column to the **Available column(s) to**

search list. When using **Global Search** and **Local Search**, if the selected column's content meets the search condition, the entity records are listed in the search results. For the columns that are not added to the **Available column(s) to search** list, the column content cannot be searched.

6. On the **Search Status** tab, the entity records with the status you add to the **Available status(es) to search** list can be searched by **Global Search** and **Local Search**. By default, the **Available status(es) to search** list is blank, and the entity records with all status are able to be searched.
7. Click **Save** to save all of the settings and the newly added entity appears in the **SearchAll Entities** List and the **Search for** drop-down list.

Editing Entities

Follow the steps below to edit an existing entity.

1. On the **SearchAll Settings** page, click the entity name in the **SearchAll Entities** list. The detailed settings of the selected entity are displayed on the right pane.
2. Refer to the steps 3 to 5 in [Adding Entities](#) to configure the settings for an existing entity.
3. Click **Save** to save all of the settings.

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