mscrm-addons.com
PowerSearch for MS CRM 3.0

PowerSearch for MS CRM 3.0

Version 1.0

Implementation Guide
(How to install/uninstall)

Table of Contents

Common Information:

Before installing TI for MS CRM 3, 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:

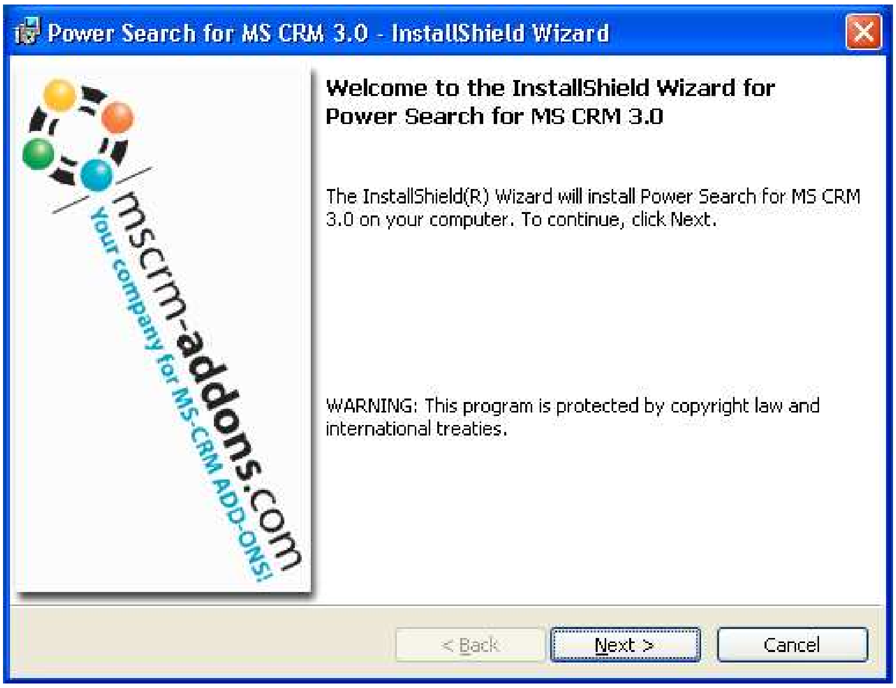
1. Installing the PowerSearch for MS CRM 3.
2. Configuring the Search -criteria

1. Installation

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

1. Intro:

Run the PowerSearch for MS CRM 3 Setup file.
Following window will appear:



Click [Next] to proceed.

2. EULA (End User License Agreement)

3. **CRM Server**

Enter the name of the CRM server.
Do not add "*http://*" nor "*https://*" to the sever name.

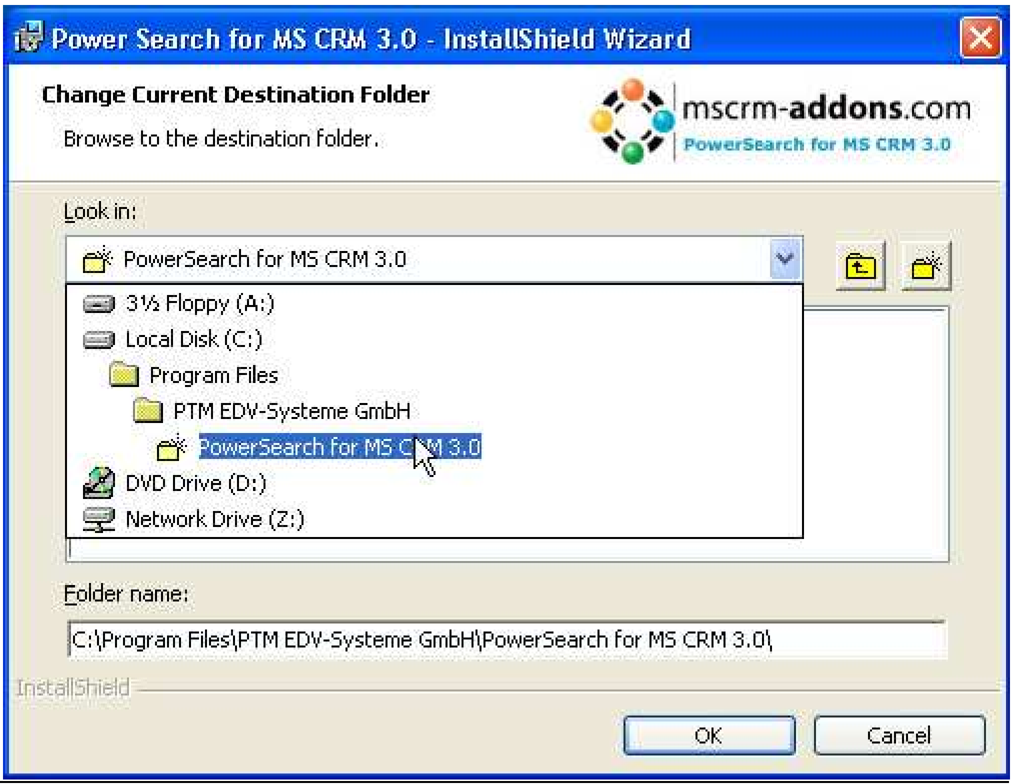
e.g: in our case CRM is called via *http://danubecrm:5555/loader*.aspx in the Internet Explorer, so we have to enter "*danubecrm:5555*" in here.

Click [Next] to proceed.

4. **Folder Selection**

Here it's possible to set the installation directory.

Press [Change] to specify the installation path.



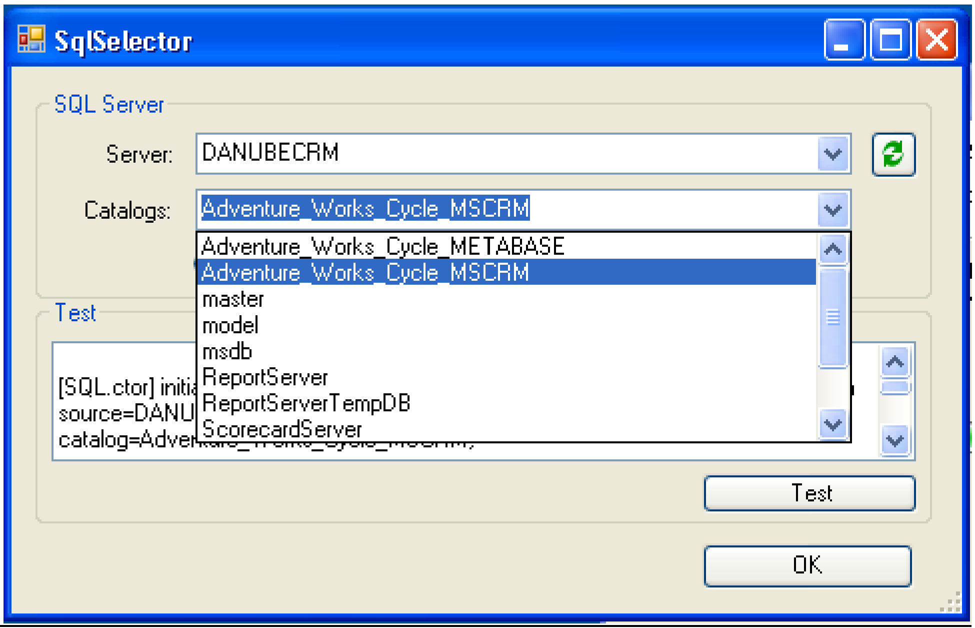
5. **Confirm Installation**

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

6. **SQL settings**

whilst the installations process you will be asked to specify the SQL settings.

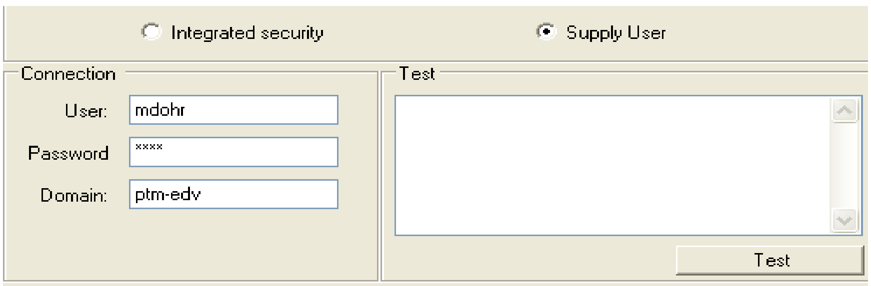
Following window will appear:



You have to specify the SQL-Servername and the MS CRM Catalaogue.

IMPORTANT: The user has to be an existing CRM user.

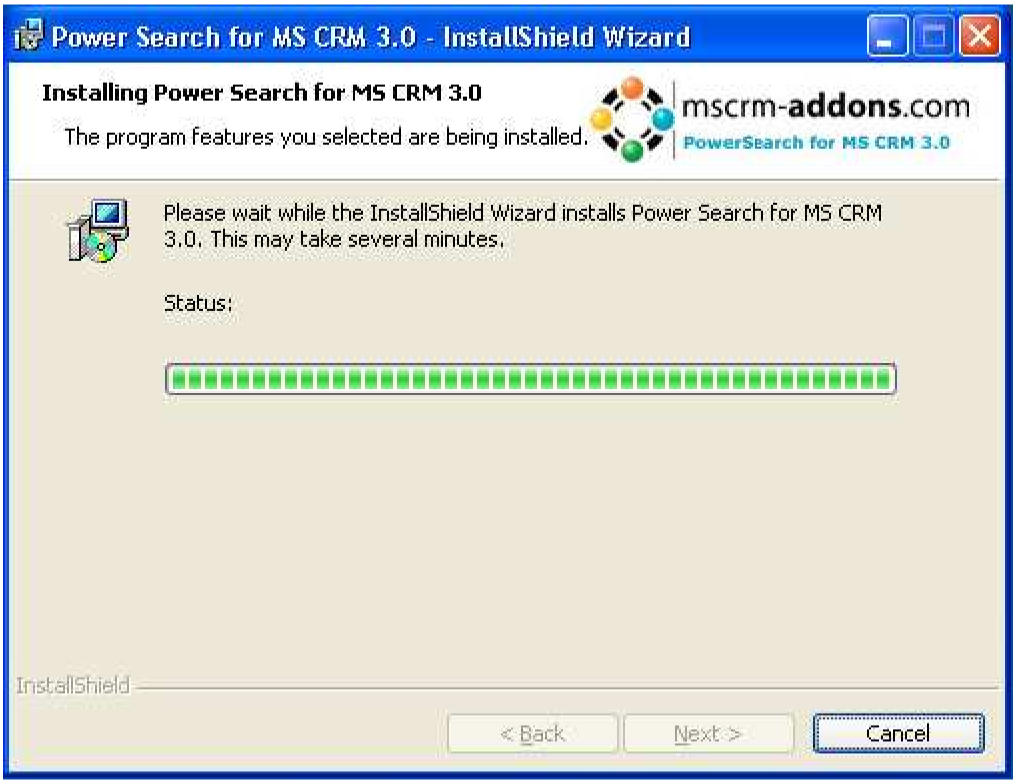
Integrated security: Check this radiobutton to logon with your local credentials.
Supply User: Check if you want to supply a specific user. In this case you'll have to enter username, password and domain of the user.



Press [Test] to verify the settings, you will see following window if the settings are correct:

7. Progress

After that, the installations progress goes on, the website is created and the files are copied, therefore it's possible that 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 takes some time if a lot documents have been saved within MS CRM so far.

8. Configuration

Next the Configuration Tool will start automatically.
For a detailed description, please go to **chapter 2**

9. Finish

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

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

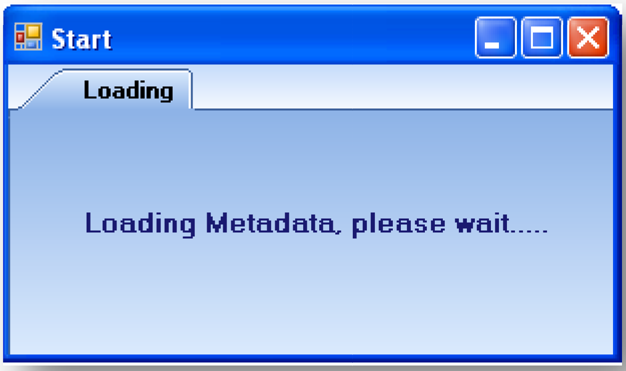
2. Configuration

The PowerSearch for MS CRM 3.0 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.

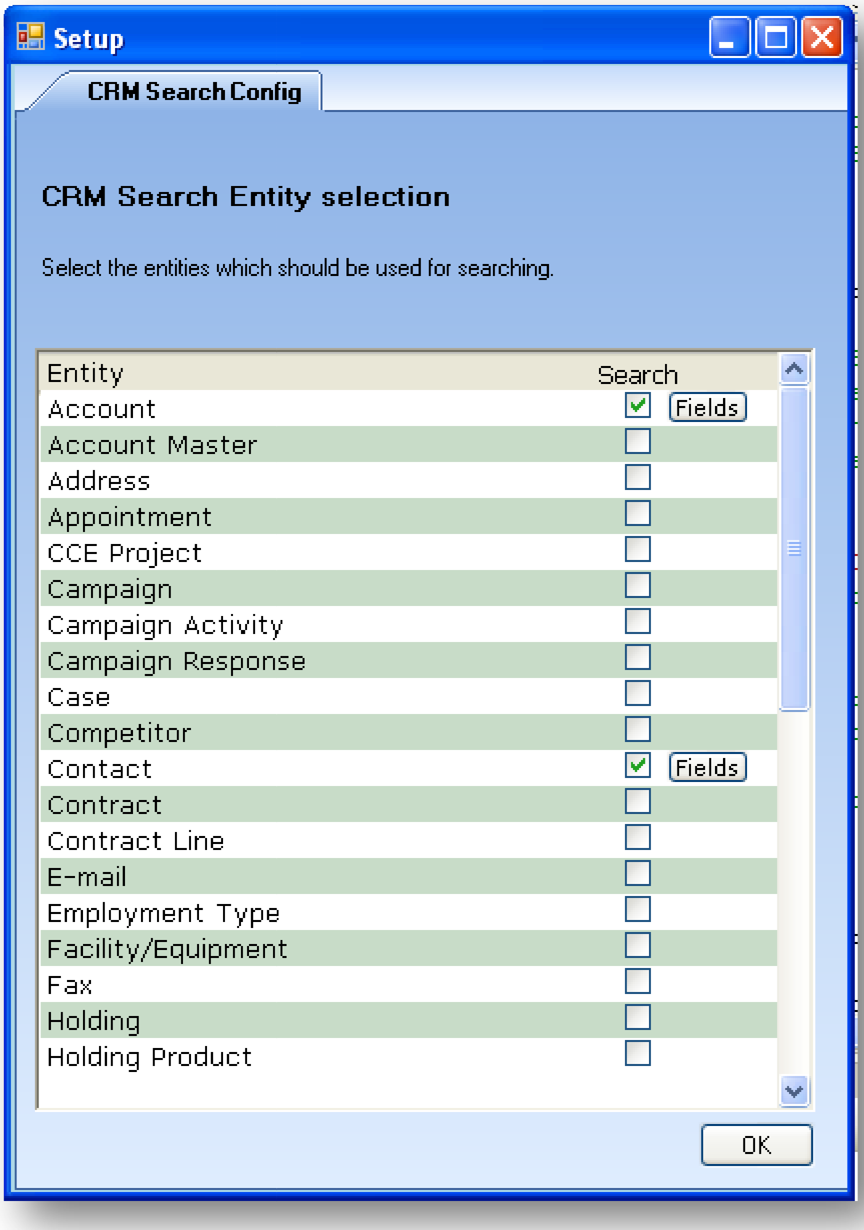
When you start the Tool you will see following loading screen:



1. The main setup form:

In the Datawindow all available entities are listed. All entities you select will show up in the entity-toolbar afterwards:

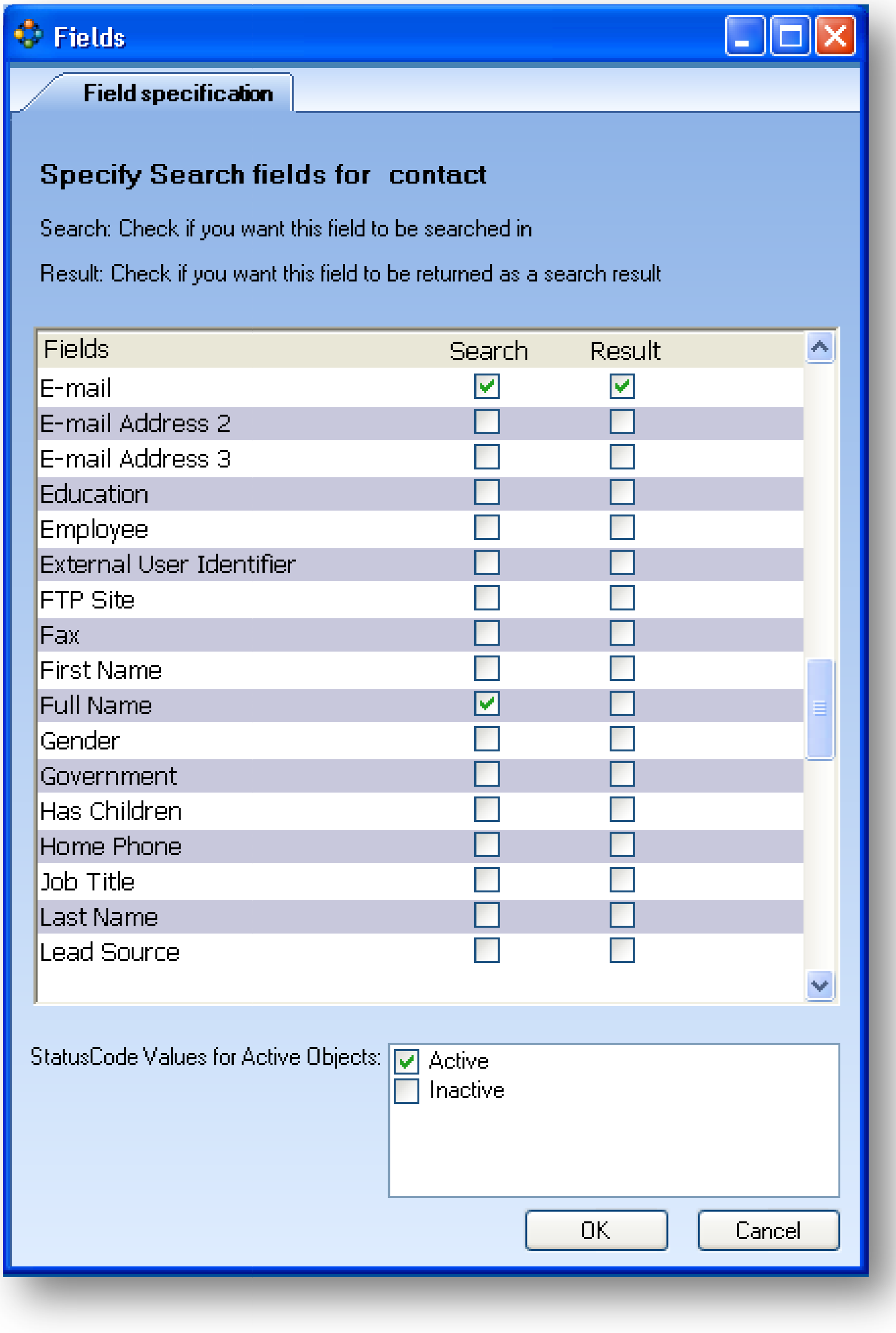
If you select one entity, a new button "fields" will appear which allows you to open a new dialogue where it's possible to define the attributes used. (see chapter 1.2)



Please press the OK button to save the settings to the config file.

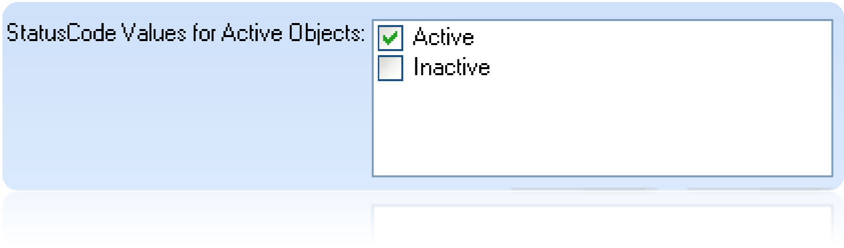
2. The fields form:

Here it’s possible to set the attributes where the search routine should search in and the attributes that should show up as a result if a record is found.

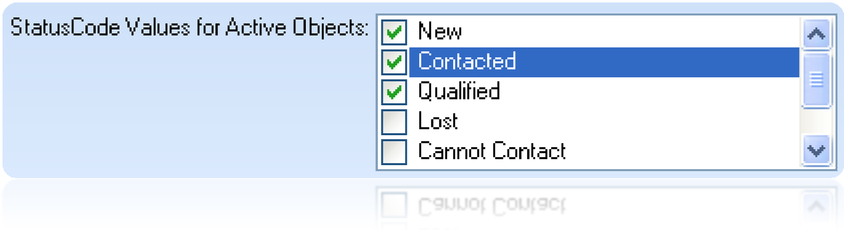


Furtheron it's possible to set the values for status-codes that should count as Active for search via the checkbox-list at the bottom.

All available status-codes are listed. Double click on the item to check.



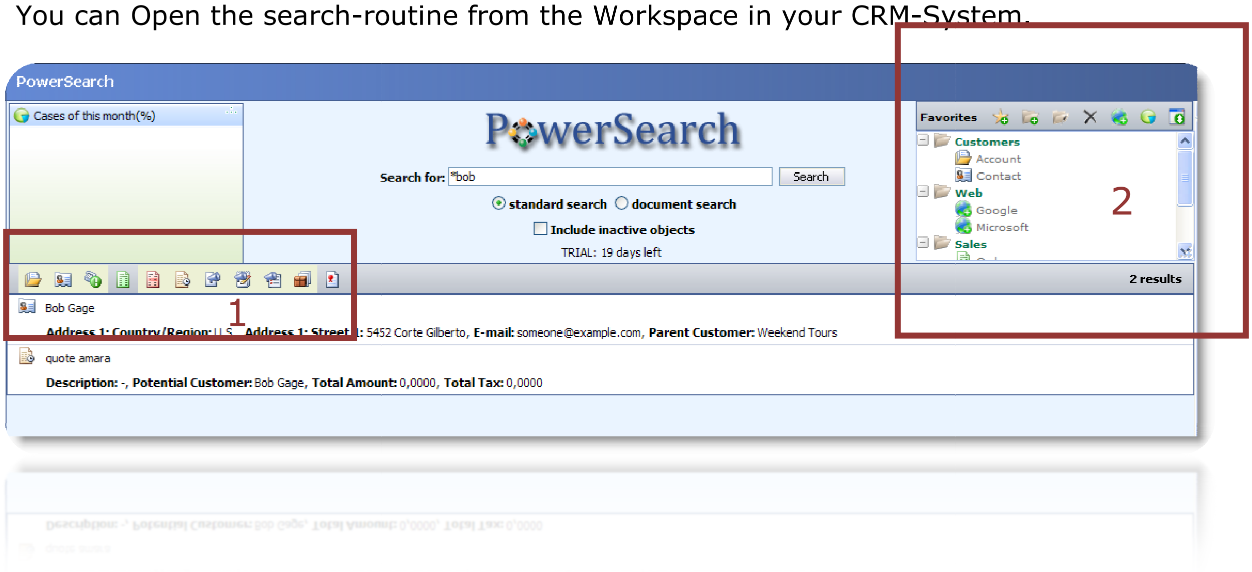
e.g.: Entity Lead, here we have 7 different states and we want to find qualified, new and contacted leads



Press [OK] to overtake the settings.

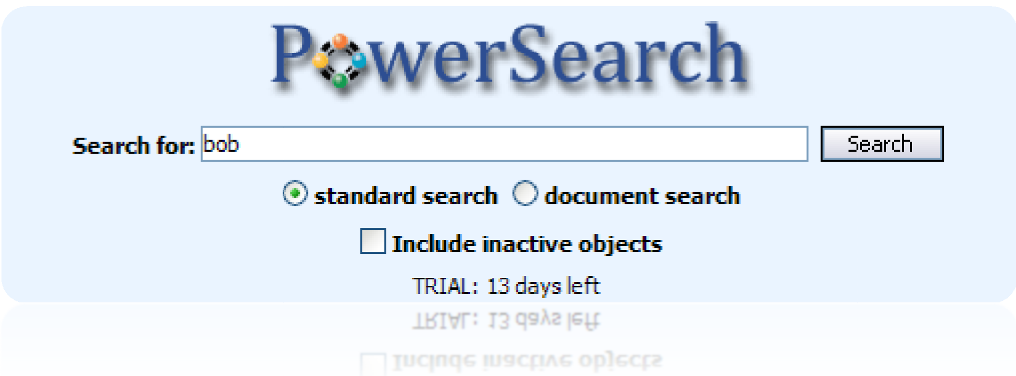
3. PowerSearch-Main Form

You can Open the search-routine from the Workspace in your CRM-System.



1. Standard search

1. Search options



Basically the PowerSearch – routine provides two search options:

1; **Standard search**: Searches through the CRM Database and lists all records.
2; **Document Search**: Lists all documents in which the keyword has been found

Next to this it's possible to decide, if inactive records (deactivated leads, etc.) should show up with the search results too. It's possible to selected states that should count as "active" in the Search – Configuration (see chapter2.2)

2. Entity selection

Here it's possible to define the entities which should be used for searching

Selected entities are lighted up by a yellow background.

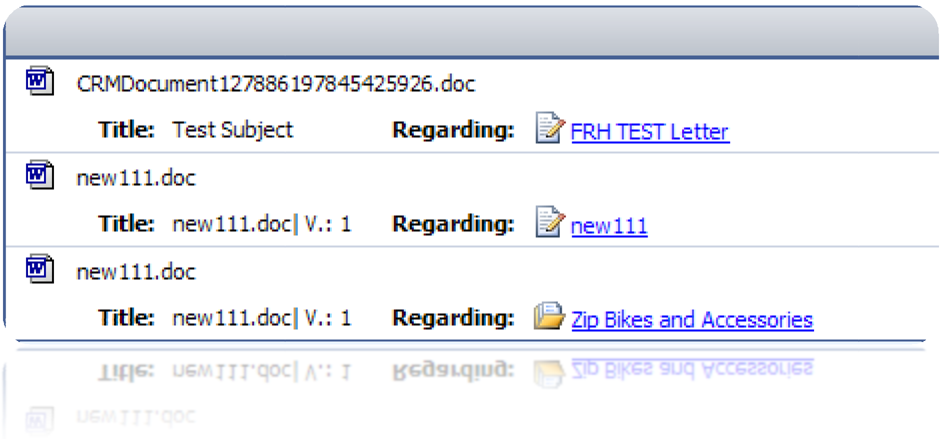
2. Document Search

The document search is based on an index service that runs on the server.
The service is started automatically whilst installation and can manually be started manually from the indexservice – folder within the installation directory of Powersearch [usually located in ***c:\program files\PTM EDV Systeme GmbH\PowerSearch for MS CRM 3.0\indexservice\CrmSuchindexDienst.exe***]

The document search is capable to search files from following format definitions:

- MS Word (*.doc)
- MS Excel (*.xls)
- MS PowerPoint (*.ppt)
- Adobe PDF (*.pdf)
- Text – files (*.txt)

When searching for documents, the result will show up in following format:



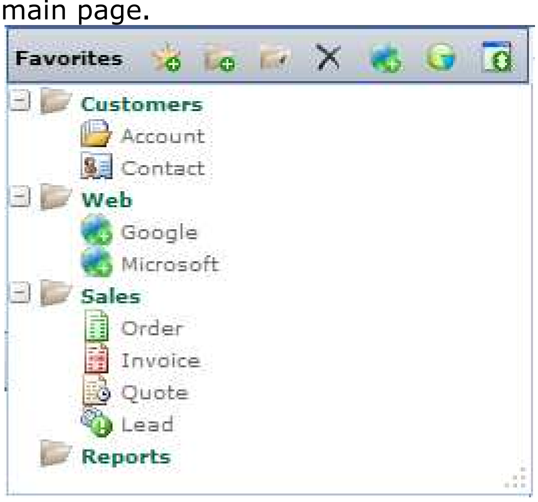
As shown above, you will get a list of all documents that contain the keyword entered and furthermore it shows up the CRM-record to which the document has been saved (company, contact, letter-/email-activity, etc…)

The index service will be updated by a task called "Schedule" every day at 10p.m. automatically. So if new documents are saved to CRM, they will not be found until the index is refreshed by the scheduler in the evening.
To manually refresh the index, please start the CRMSuchIndexDienst.exe from the installation directory of Powersearch [usually located in ***c:\program files\PTM EDV Systeme GmbH\PowerSearch for MS CRM 3.0\indexservice\CrmSuchindexDienst.exe***]

IMPORTANT: a task called "schedule" is created automatically within the Windows/System32/ - directory. In most cases services are disabled on MS 2003 Server – machines. As a result the ***schedule***-task is not started and therefore the index is not updated automatically. Please open the services on the server and set the ***schedule*** –task to "automatically"

3. Favorites

The favorites provide a possibity to compile your favorites and to make them accessible within the search routine. The result will show up in an I-frame on the main page.

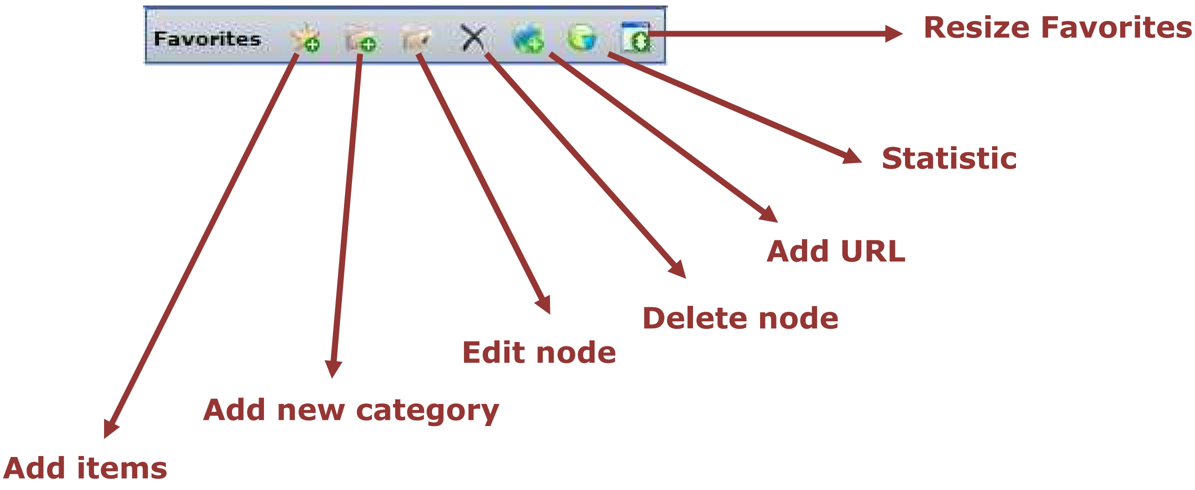


It is possible to add:

- Entity overviews: Show up the main entity – search from from CRM
- Advanced search: Shows up the results of predefined Advanced Searches
- URL’s: Show up a specified URL

How edit favorites

The Favorites menu provides following possibilities:

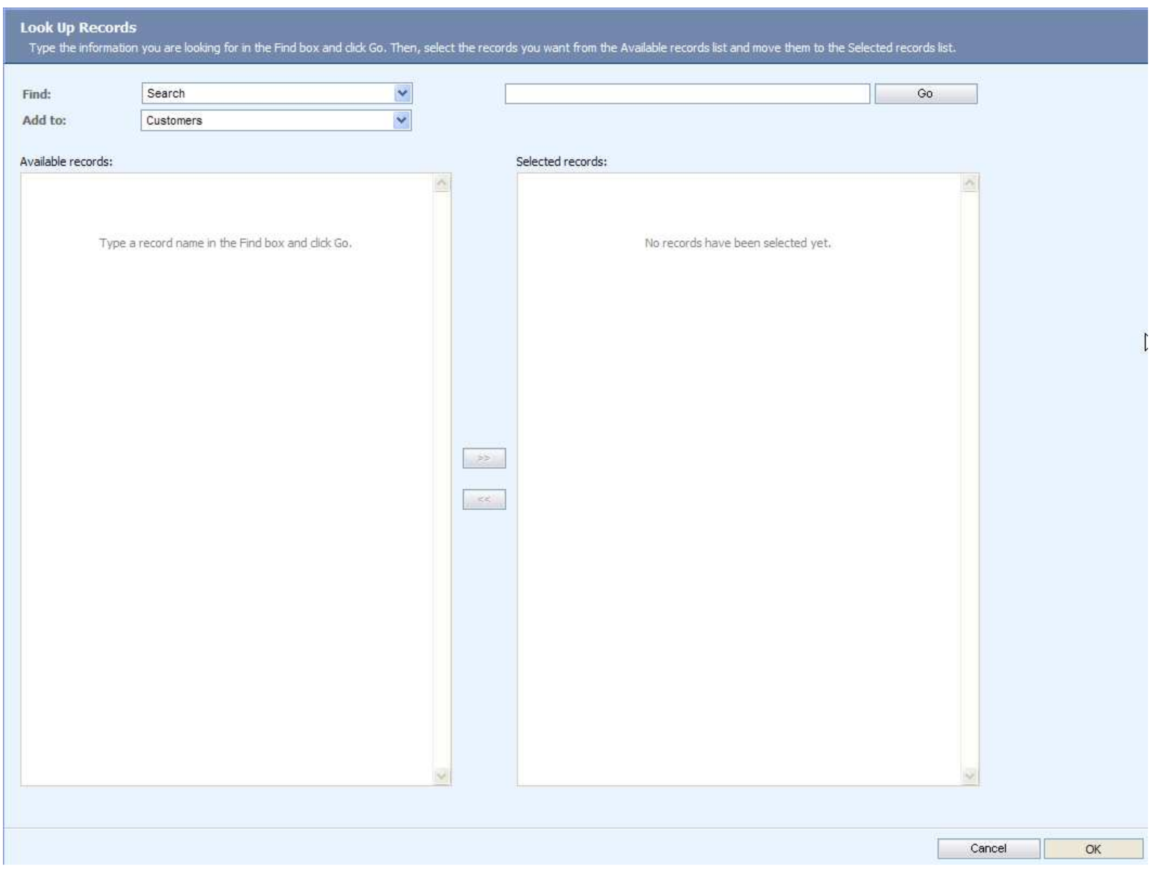


3. <u>Add Items:</u>

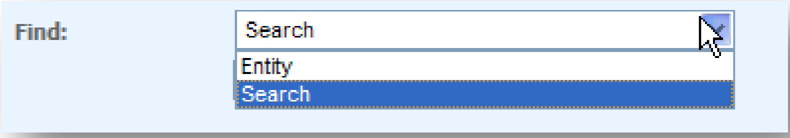
It's possible to add two types of entries to the favorites here

a. Entities: provide an entity overview
b. Predefined advanced searches

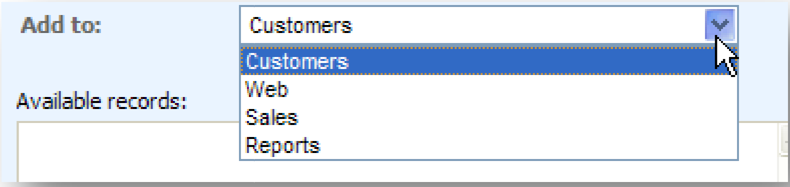
With a click following window appears:



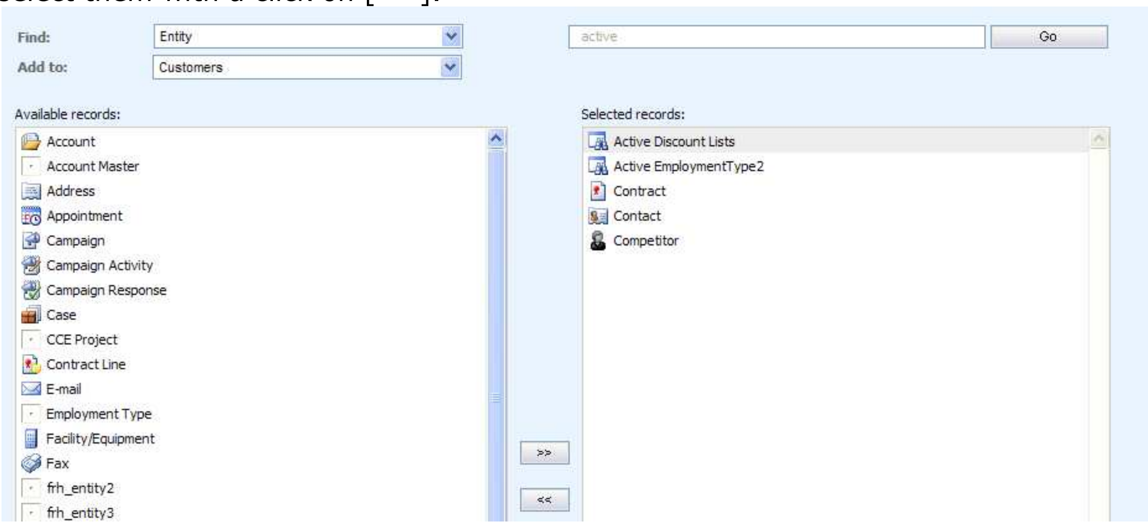
You can choose the type with the 1st drop-down-listbox:



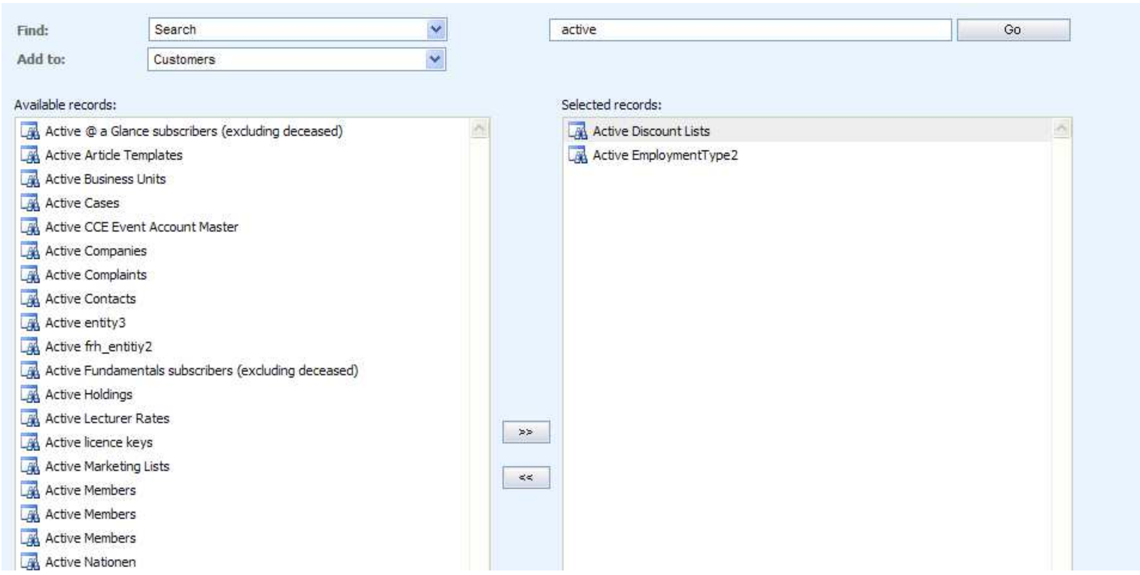
You can specify the category to which you want to add the favorites with the 2nd drop-down-listbox:



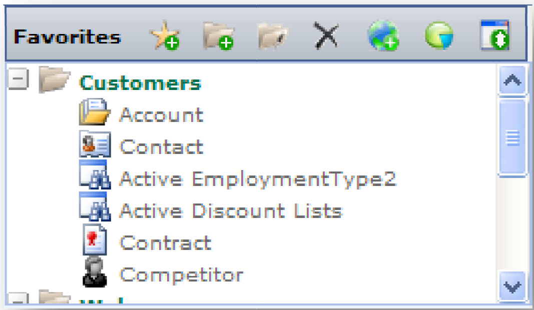
If you choose type "Entity" all entities will appear in the left listbox, you can add select them with a click on [>>].



Basically it's the same for Advances Searches. Additionally it's possible to search for them:

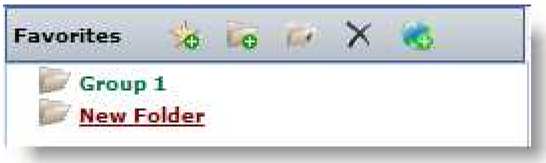


All chosen entries will be added to the favorites -menu on the right top-corner afterwards:



4. 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.



5. Edit node:

With a click following window comes up:

Here its possible to rename the selected node (Category or entry).

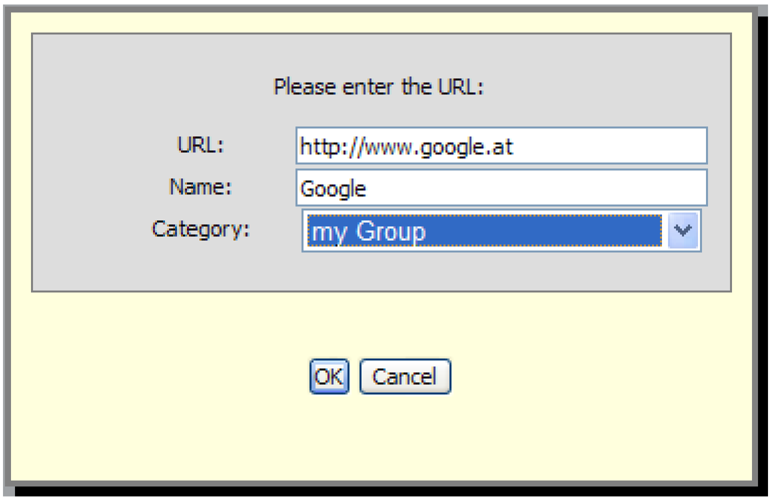
6. Delete node:

Deletes the selected node from the Favorites

7. Add URL:

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

With a click, following window appears:

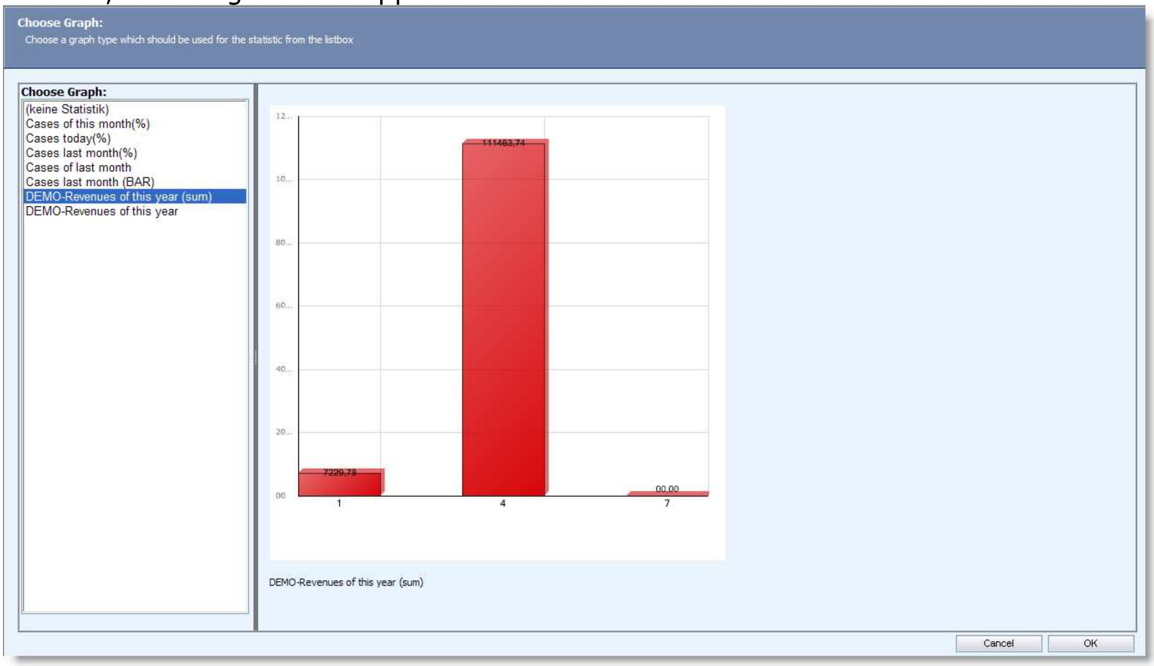


Afterwards a new node with the URL will show up in the tree and therefore can be accessed with PowerSearch:

8. Statistic:

Here it's possible to select the statistic, that should be presented in the statistic – sector on the main form afterwards.

On click, following window appears:

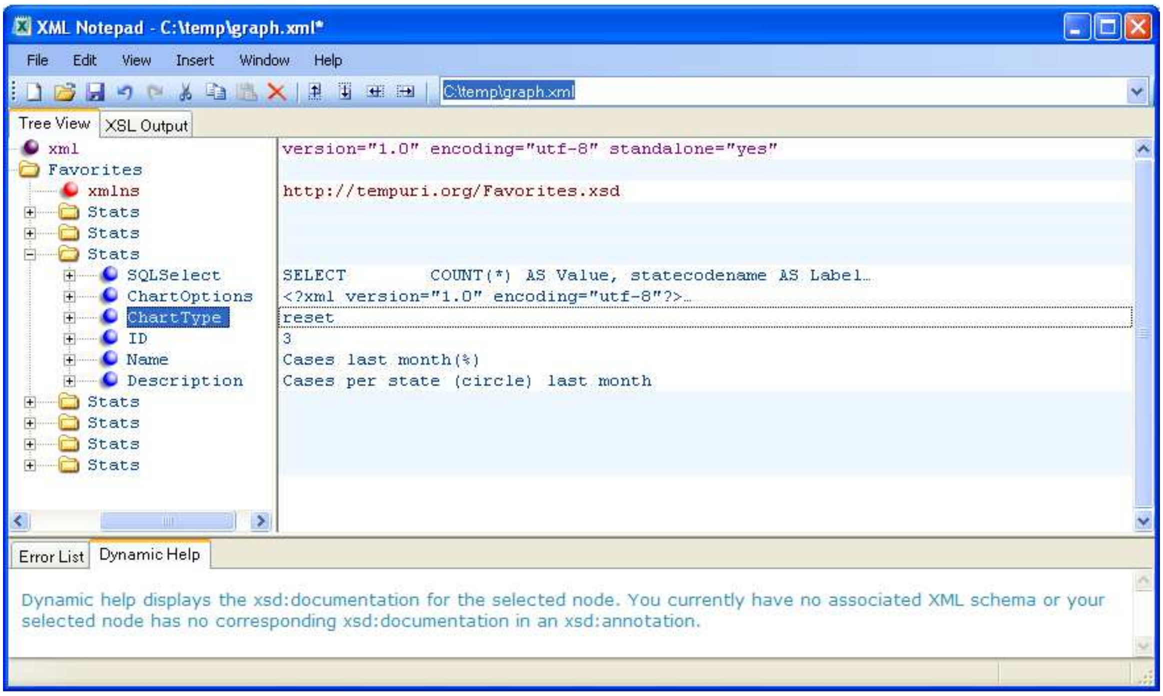


Here it's possible to select a statistic from the listbox on the left.

Add statistic: (**for enhanced users**)

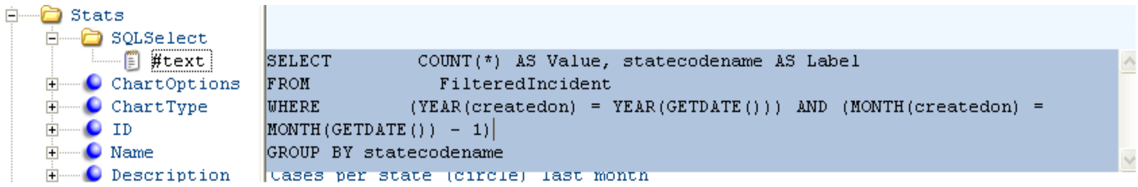
This option requires XML and SQL- knowledge.

Basically statistics are defined in the graph.xml in the config-folder of PowerSearch for MS CRM 3.0.
(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.

9. <u>Resize:</u> Enlarges the Favorites window

4. Contact

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