

Search for Dynamics v1.4.3.1

Installation Guide

SharePoint 2013, 2016 or Online

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Chapter 1: Prerequisites

To install Search for Dynamics, the following software components are required:

- SharePoint Server 2013, 2016, or Online with an out-of-the-box search center
- Microsoft Dynamics CRM 2016 (On Premise or Cloud version)

Chapter 2: Install Search for Dynamics

Install SharePoint Templates and Pages

The search results page of the search center is displayed inside Dynamics, and supports Dynamics specific actions. For this reason, you must customize the pages and templates.

- 1. On your SharePoint search center site, click on the gear icon and select **Site settings**.
- Go to Web Design Galleries > Solutions. On the ribbon select SOLUTIONS > Upload Solution. Upload the BAI Dynamics Search Pages wsp file for your SharePoint version.
- 3. Activate: Click.
- 4. Go back to your SharePoint search center site, click on the gear icon and select Site Settings > Look and Feel > Page layouts and site templates. Go to Page Layouts and add (Welcome Page) Compact Search Results to the list on the right. Scroll down the page and click OK.

Specify the page layouts preferred for new pages in this site.	 Pages inherit preferred layouts from parent site Pages in this site can use any layout Pages in this site can only use the following layouts: 	
The article page with body only contains a rich text field.	(Article Page) Body only (Article Page) Image on left (Article Page) Image on right (Article Page) Summary links (Catalog-Item Reuse) Balank Catalog Item (Catalog-Item Reuse) Catalog Item Image on L (Enterprise Wiki Page) Basic Page (Error Page) Error (Project Page) Basic Project Page	(Welcome Page) Compact Search Results (Welcome Page) Search results Add > Remove

- Gear icon: Click and select Site contents > Pages. Scroll to results (or to the selection that you named in the search results page). From File in the ribbon, select Download a copy. Save the file as a new name for example compactresults.aspx.
- (On the ribbon) Files: Select and click Upload Document. Upload your compactresults.aspx file. In the Add a document pop-up window, click
 Check in. (You might need to refresh the page for the page to appear in the list.)
- 7. Gear icon: Click and select Site settings > Master pages and page layouts. Find CompactSearchResults.aspx, click on the page and from the dropdown under Advanced, select Publish a major version.

CompactSearchResults.aspx	4/28/2017 2:26 AM □ S
Open in Microsoft SharePoint Designer	Acci 4/25/2017 5:20 AM
Download	Acc
Share	4/25/2017 5:19 AM 🗆 S Acc
Rename	4/25/2017 5:20 AM 🗆 S Acc
Delete	4/25/2017 5:17 AM 🗌 S
Сору	Acc
	Shared With
Version History	Compliance Details
Properties	Check Out
Advanced •	Follow
🗋 oslo.preview	Publish a Major Version

- 8. Go back to the Pages library (by clicking the gear icon and selecting **Site Contents**) Click to open the page you saved earlier for example Compactresults. Click on the gear icon, and select **Edit page**.
- On the ribbon select Page > Page Layout, and select Compact search results.
- Add and configure all search related web parts, such as the Search Box, Search Results, Refinement, and so on. To see the SharePoint page, press CTRL + Z, click on the gear and click Edit page.
- 11. Press CTRL + Z and click Add a Web Part. In the ribbon, under Search, add the three (3) web parts (Search Box, Search Results (Main Zone) and Refinement (Navigation Zone)) to the page.
- 12. Go to the Search Results web part > Settings. Under Display Templates, choose Use a single template to display items, and select Dynamics Item from the list.

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Item Display Template	
Dynamics Item	~

Install the Dynamics Components

- 1. Log into Microsoft Dynamics CRM using appropriate permissions.
- 2. (Main menu) Go to Settings > Solutions.

	Search	for Dynamics v1.4.3.1 In	stallation Guide
Microsoft Dynamics (CRM 📃 Service 🗸	Cases 🗸 Search Applicati	ion v
Sales	Service	Marketing	Settings
Business	Customization	System	
Business Management	Customizations	Administration	Email Configuration
Templates	Solutions	Security	Activity Feeds Configu

- 3. Import: Click and upload the BAI Dynamics Add-on zip file.
- 4. Click on the name of the imported package, and select Configuration in the tree on the left side.
- 5. Go to the General section and set both URLs to the location of your new file. For example, compactresults.aspx. On the SharePoint server, this might be something like http://{SharePoint Server Name}/sites/{name of

SharePoint	site}/ /Pages/·	{Name of page}.aspx.Click Save.	
Solution BA Insight Crm	INSIGHT	Search for Dynamics	
A Configuration	GENERAL		
Components Components Entities Option Sets	Default Embedded Search URL: Full Screen Search URL:	http://sp2016jason/sites/DynamicsOoTB/Pages/compactresults.aspx http://sp2016jason/sites/DynamicsOoTB/Pages/compactresults.aspx	

Chapter 3: Use Search for Dynamics

After Search for Dynamics is loaded, you can use Search for Dynamics to access results within the new Collateral tab:



Use the Search links to access an embedded search site where you can use BA Insight products and/or SharePoint out-of-the box to refine your results:



For More Information

Contact Us

www.BAinsight.com for information about all BA Insight products and services.

For questions about this document or installation assistance, please email <u>Sales@BAinsight.com</u>