



Search for Dynamics v1.4.3.1

Installation Guide

SharePoint 2013, 2016 or
Online

Contents

Chapter 1: Prerequisites	3
Chapter 2: Install Search for Dynamics	4
Install SharePoint Templates and Pages.....	4
Install the Dynamics Components	5
Chapter 3: Use Search for Dynamics	7
For More Information	8

CONFIDENTIALITY STATEMENT. The information contained in this document is considered confidential and proprietary to BA Insight, LLC. It is intended for use exclusively by BA Insight and its client and their respective subsidiaries and affiliates. It is submitted in commercial confidence and is to be used solely for the purpose for which it is furnished. This document and the information it contains may not be transmitted, reproduced, disclosed or used otherwise, in whole or in part, without BA Insight's express written authorization.

© BA Insight. All rights reserved. BA Insight is a registered trademark of BA Insight. All other marks are registered trademarks of their respective owners.

Chapter 1: Prerequisites

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

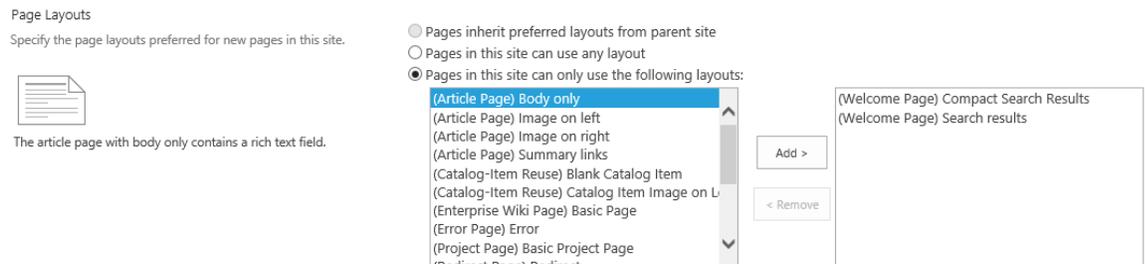
- SharePoint Server 2013, 2016, or Online with an out-of-the-box search center
- Microsoft Dynamics CRM 2016 (On Premise or Cloud version)

Chapter 2: Install Search for Dynamics

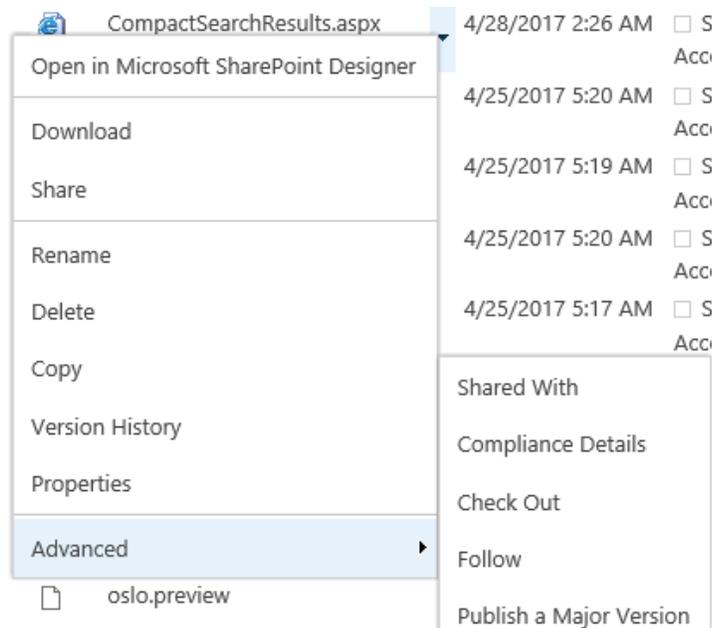
Install SharePoint Templates and Pages

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.

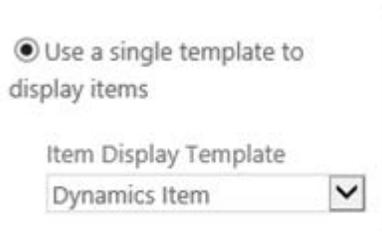
1. On your SharePoint search center site, click on the gear icon and select **Site settings**.
2. Go to **Web Design Galleries > Solutions**. On the ribbon select **SOLUTIONS > Upload Solution**. Upload the BAI Dynamics Search Pages wsp file for your SharePoint version.
3. **Activate**: Click.
4. Go 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**.



5. 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`.
6. (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 drop-down under **Advanced**, select **Publish a major version**.

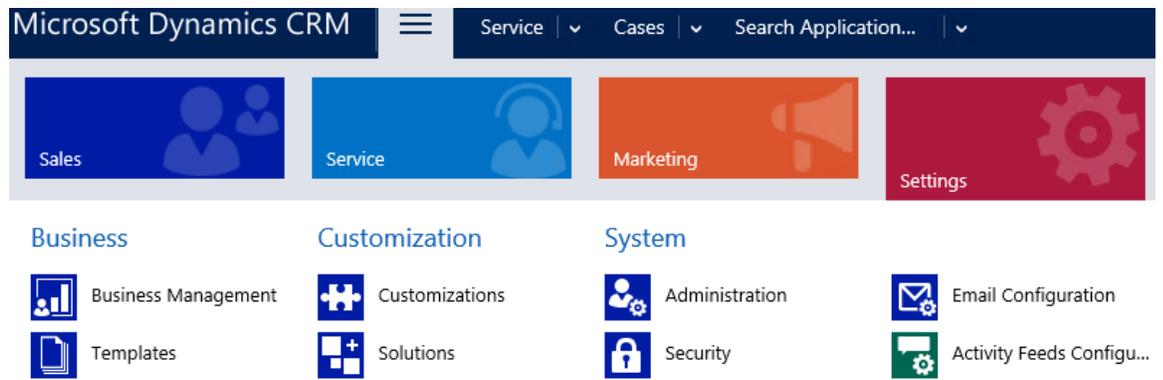


8. Go back to the Pages library (by clicking the gear icon and selecting **Site Contents**) Click to open the page you saved earlier for example Compactresults. Click on the gear icon, and select **Edit page**.
9. On the ribbon select **Page > Page Layout**, and select Compact search results.
10. Add 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.



Install the Dynamics Components

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

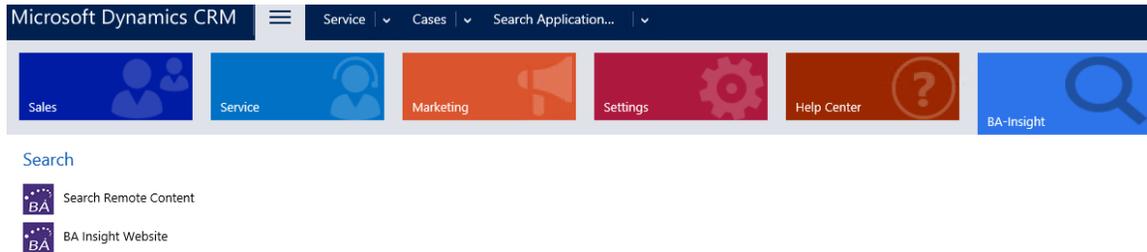


3. **Import:** Click and upload the BAI Dynamics Add-on zip file.
4. Click on the name of the imported package, and select Configuration in the tree on the left side.
5. Go to the **General** section and set both URLs to the location of your new file. For example, compactresults.aspx. On the SharePoint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

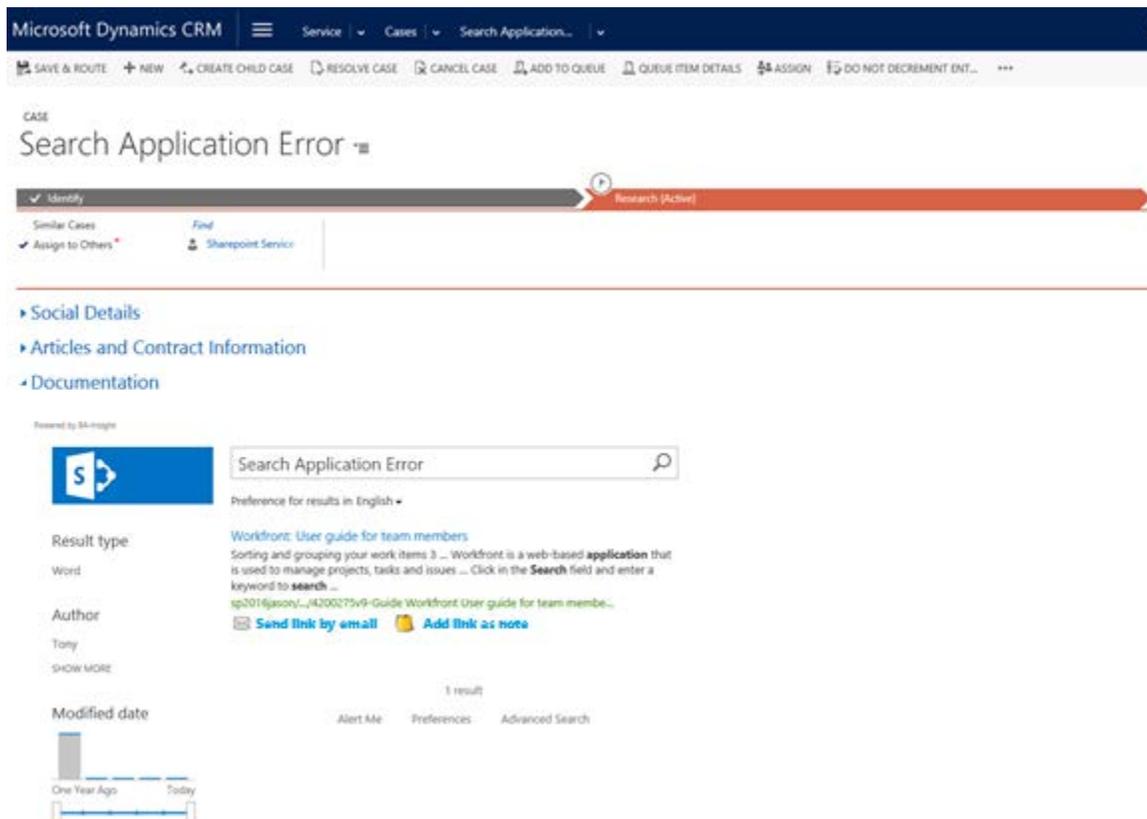


Chapter 3: Use Search for Dynamics

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 Sales@BAinsight.com