

# AKVELON

## **Global Search v 3.6 for Microsoft Dynamics CRM 2011 Online**

### **User Manual**

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## Overview

Welcome to the Akvelon Global Search User Manual. With this guide, you can learn how to install, configure, and use Akvelon Global Search for Microsoft Dynamics CRM 2011 Online.

Global Search for Microsoft CRM 2011 Online is a custom module which allows you to search across all CRM entities at the same time, providing results in a single-view convenient layout.

Global Search provides the ability to:

- Search all records in all CRM entities (including custom entities) at once from inside the CRM workspace
- View search results grouped by entities at a single glance
- Filter results in the column headers of each entity
- Configure entities to search, attributes to search by, and information to display
- Search custom entities (Search by Lookup fields)
- Ability to search attachment contents

# What's New in Global Search for CRM 2011 Online

## Version 3.0:

- Improved search performance
- Ability to configure “Attributes to search by” for each user separately
- Ability to configure “Attributes to display” for each user separately
- Ability to remove Global Search permissions from Administrator group
- Fixed minor issues which enhance usability and search function

## Version 3.5:

- Ability to search attachment contents
- Ability to change and “Set as Default” Global Search settings for all users
- Added multi threading indexing
- Added sorting in columns for search result window
- Simplify configuration module
- Improved UI
- Ability to quickly modify Search Settings into search page

## Version 3.6:

- Added Email indexing feature
- Improved searching performance by Email description

## Version 3.6.1:

- Fixed minor issues related to Email indexing feature

## Licensing

Whether you are using Microsoft Dynamics CRM 2011 Online in your production, development or test environment, you always need user license keys.

Each organization requires its own license for Global Search. In a typical setup you have one single organization and only need one license. The license contains the organization name and can only be installed on the organization with the specified name.

If you use multiple organizations, each organization requires a separate Global Search license. However, you only need licenses for the organizations using Global Search.

Each organization license (except the trial one) contains a restricted number of client user licenses (CAL). Each user of an organization that uses Global Search must have a valid license. If an organization has 100 users and 50 users have permissions to perform search using Global Search (see Global Search Users Permissions section), you need at least 50 Global Search licenses, otherwise you will receive a license validation error.

When adding new users to CRM, be sure to check that Global Search also has corresponding licenses for new users.

To request Global Search licenses please contact [gs.support@akvelon.com](mailto:gs.support@akvelon.com) or visit [akvelon.com](http://akvelon.com).

# Installation

## Upgrading from Version 3.0 to 3.5 and higher

To upgrade from Global Search version 3.0 to version 3.5 (3.6) you need to completely uninstall the previous version of Global Search from your CRM server (see Uninstall Global Search section) and then install new version of Global Search (see Global Search Installation section).

**Please note:** Due to significant architecture changes in version 3.5 of Global Search, configuration data won't migrate from version 3.0. **License key for 3.0 can be used for 3.5.** Please [contact us](#) if you want to enable Attachments Search feature.

**Please note:** We strongly recommend emptying the cache in the IE browser before working with the updated version of Global Search.

## Upgrading from Version 3.5 to 3.6 and higher

To upgrade from Global Search version 3.5 to version 3.6, download new version from [Akvelon.com](http://www.akvelon.com) site and install it (NO NEED TO REMOVE 3.5 version). During installation, select the **Maintain customizations (recommended)**, and check the **"Activate any processes and enable SDK messages..."**

## Global Search Installation

To set up Akvelon Global Search on Microsoft Dynamics CRM 2011 Online, follow these steps:

1. Download Akvelon Global Search by the following link:  
<http://www.akvelon.com/layouts/Akvelon/GlobalSearchForCRM2011.aspx>
2. Log on to your Microsoft Dynamics CRM 2011 server using an account that has administrative privileges (System Administrator or System Customizer)
3. We are strongly recommend to add your CRM server site into trusted sites before installation
4. Go to **Settings -> Solutions**
5. Click the **Import** button (see Figure 1)

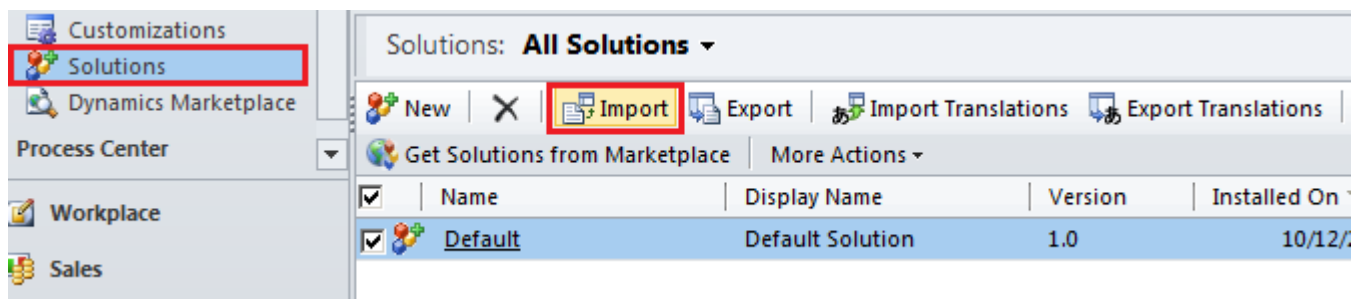


Figure 1 Import Global Search solution

- 6.1. Click the **Browse** button and select the path to GlobalSearchSetup.zip and click the **Next** button (see Figure 2)

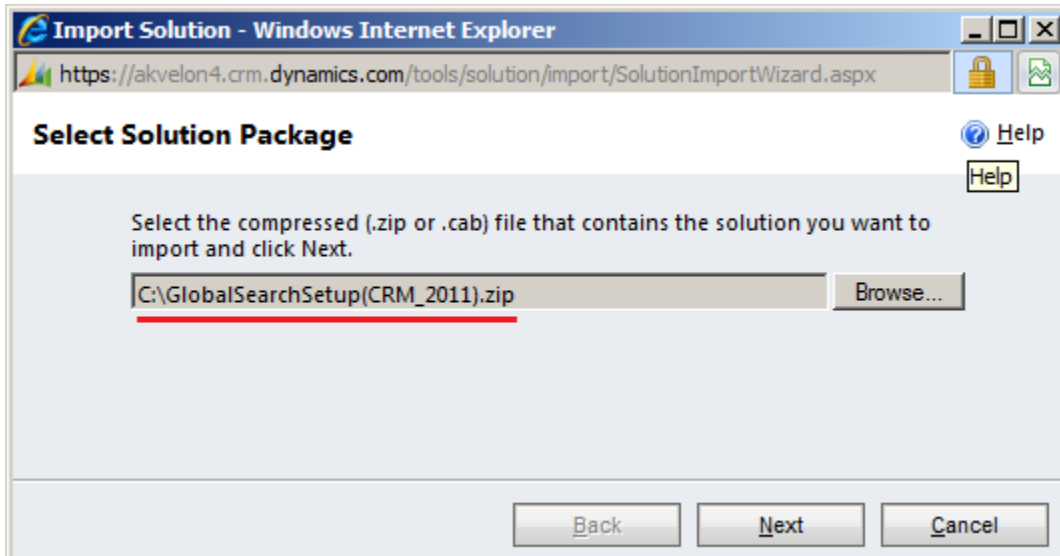


Figure 2 Select the Global Search solution

- 6.2. Click the **Next** button again
- 6.3. Check the "**Activate any processes and enable any SDK message processing steps included in the solutions**" checkbox and click the **Next** button (see Figure 3)

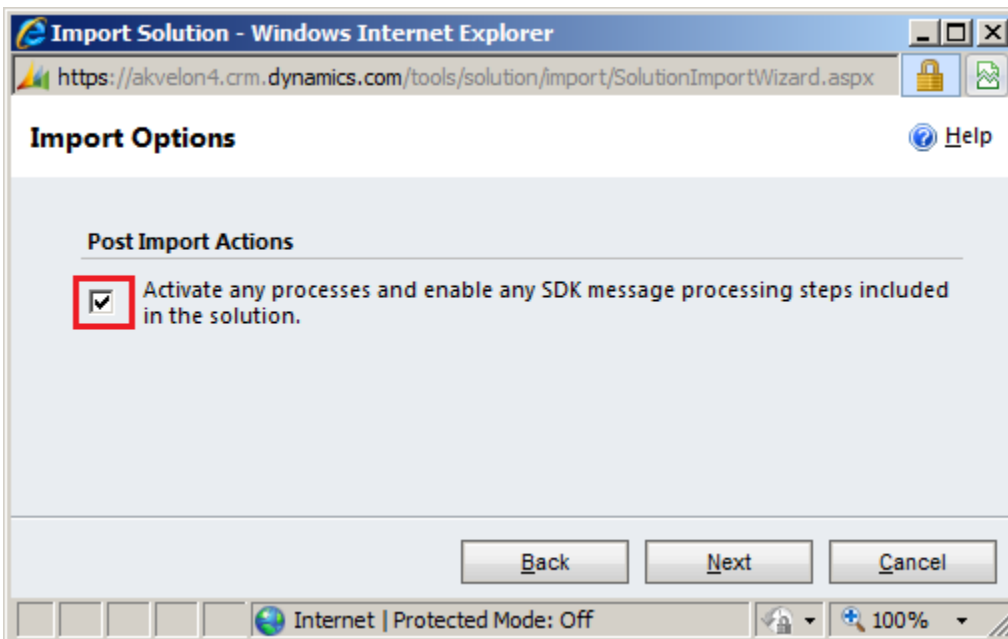


Figure 3 Activate any processes and enable SDK message

- 6.4. Click **Next** and wait while the solution is installed
- 6.5. Click the **Close** button
7. Refresh the browser page using Ctrl+F5.
8. After installation, Global Search should be activated (see Activation section for more details)
9. Give search rights to users (see Global Search Users Permissions section)

**Please note:** Search in attachment contents feature will be installed together with Global Search, but if your license key not include Attachment search – this feature will be disabled for your CRM Online organization. Please [contact us](#) to get license key with Attachment search functionality. **To enable Attachment search feature - CRM Database must be indexed after installation (see Configuring Attachment Search section).**

## Activation

Activate Global Search separately for each organization.

To activate Global Search for an organization, go to **Settings** -> **Global Search Settings** and click the **About** button at the upper right corner. You will see the **End User License Agreement**, please read and accept it using the checkbox, then click the **Activate** button. Input your Global Search license into the open license window and click the **Update license** button (see Figure 4).

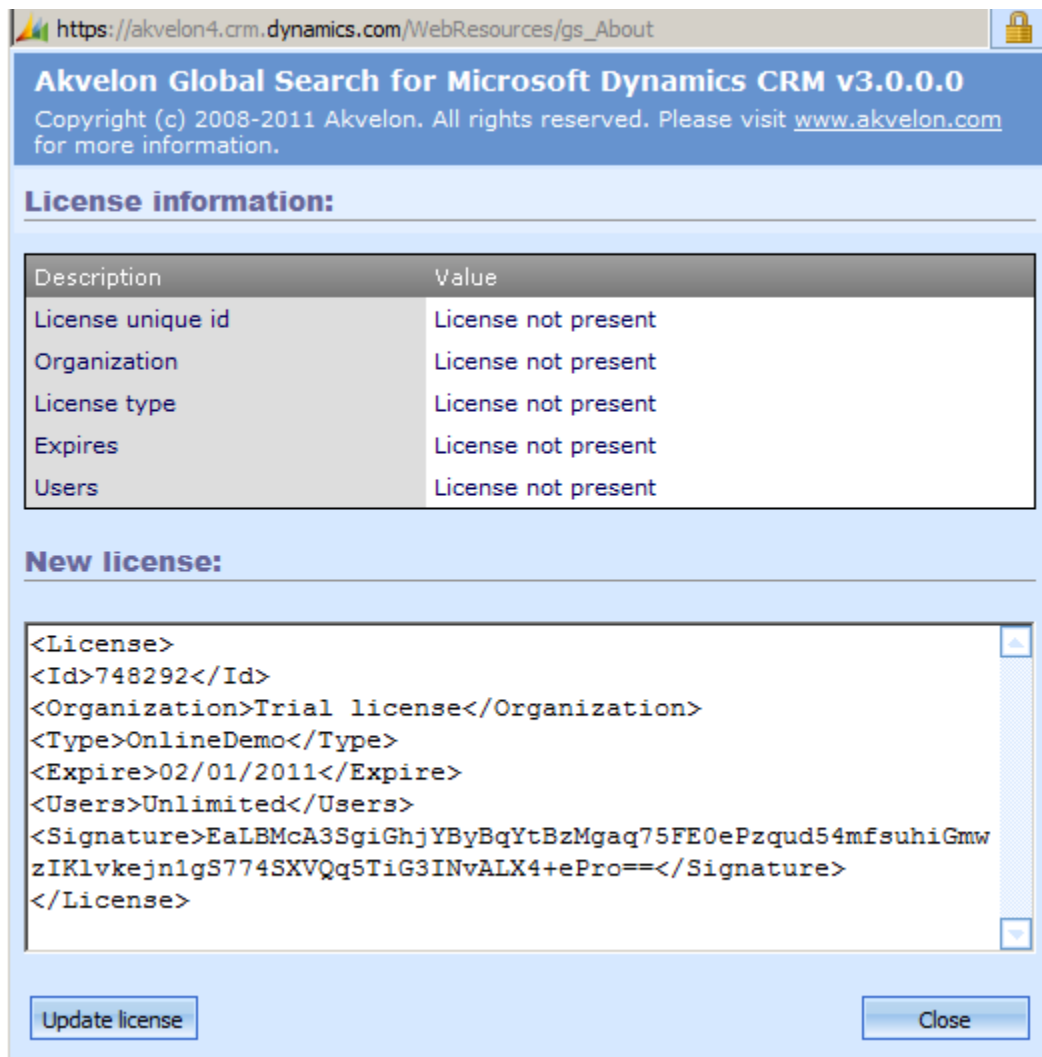


Figure 4 Activate Global Search

### Please note:

1. You can get the free 14-day trial version of Global Search from [akvelon.com](http://akvelon.com).
2. Visit [akvelon.com](http://akvelon.com) or contact [gs.support@akvelon.com](mailto:gs.support@akvelon.com) to purchase Akvelon Global Search for Microsoft Dynamics CRM 2011 Online.

## Updating License Data

If you need to update license data (e.g. to input commercial license instead of trial, update number of users or **enable search in attachment contents feature**) go to **Settings -> Global Search Settings** and click the **About** button at the upper right-hand corner. Then click the **Update license** button, put the new license data into the license textbox (see Figure 5) and click the **Update license** button.

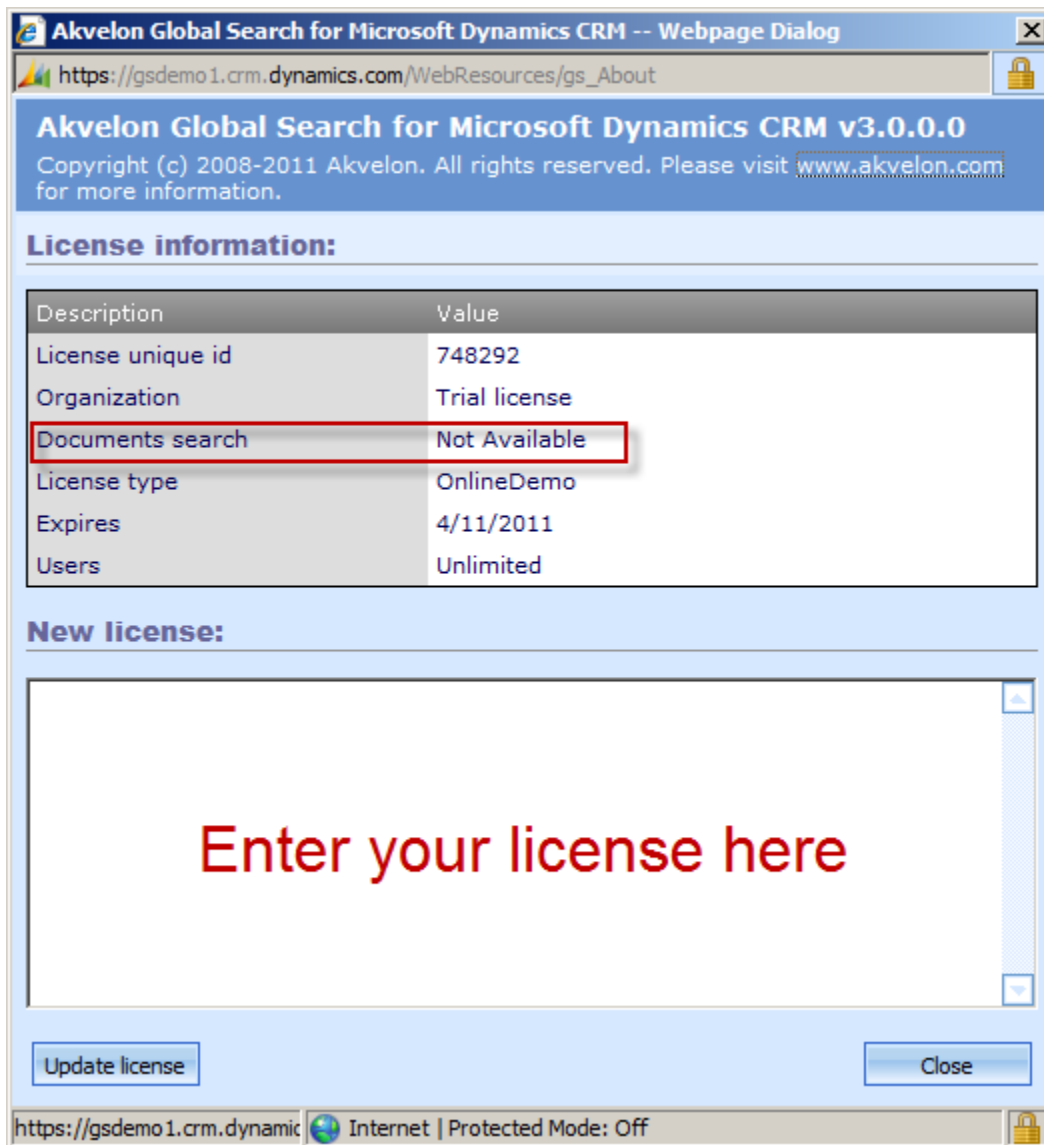


Figure 5 Update Global Search license

## Global Search Settings Backup/Restore

All configuration settings of Global Search are stored inside the CRM database and do not require additional backup.

If you restore CRM from a backup to a new server you should install Global Search (please see Installation section). All activation, license and configuration data will be preserved.

## Uninstall Global Search

To uninstall Global Search, please follow these steps:

1. Go to **Settings -> Solutions** page
2. Check the **AkvelonGlobalSearchOnline** checkbox and click the delete button (see Figure 6)

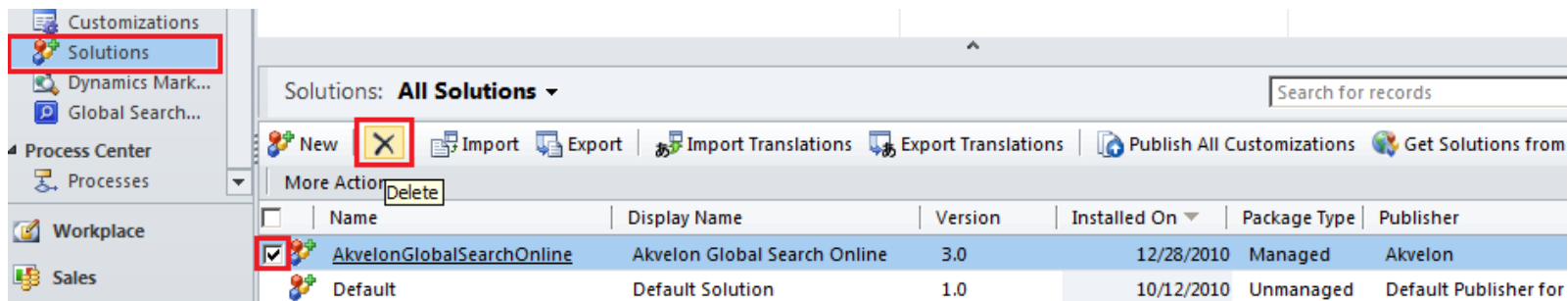


Figure 6 Uninstall Global Search

3. Click **OK** in the confirmation dialog and wait while Akvelon Global Search is removed (see Figure 7)

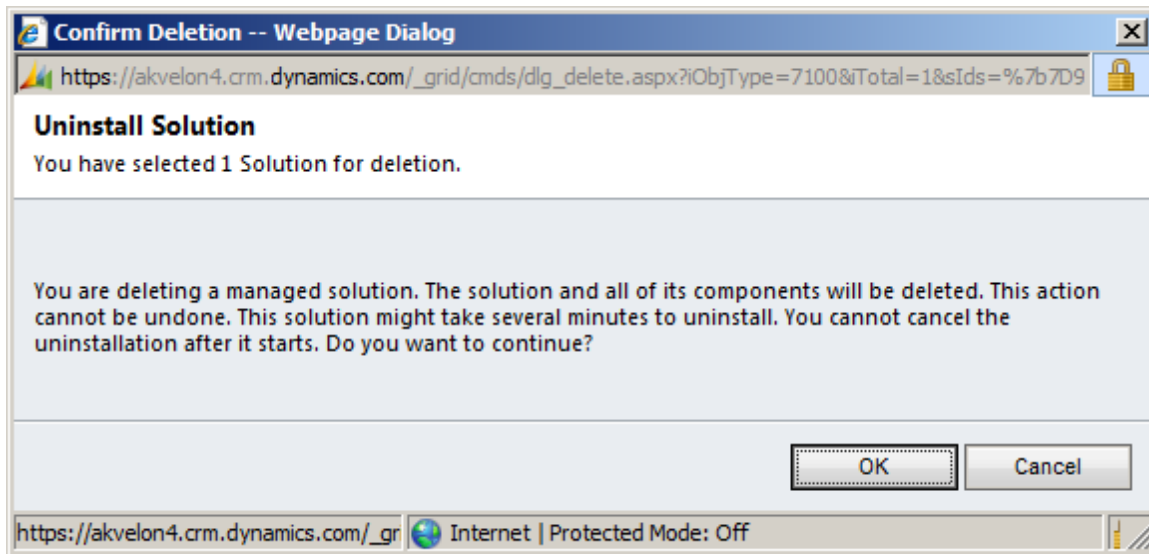



Figure 7 Confirm Deletion dialog

## Searching with Akvelon Global Search

Akvelon Global Search can search various data items (such as customers, accounts, activities and etc) in a single query.

To use the search, go to the tab where the Global Search link was added in the Microsoft Dynamics CRM application, and select the Global Search link). Type a word(s) into the search field and click the Search button  or press Enter (see Figure 8)

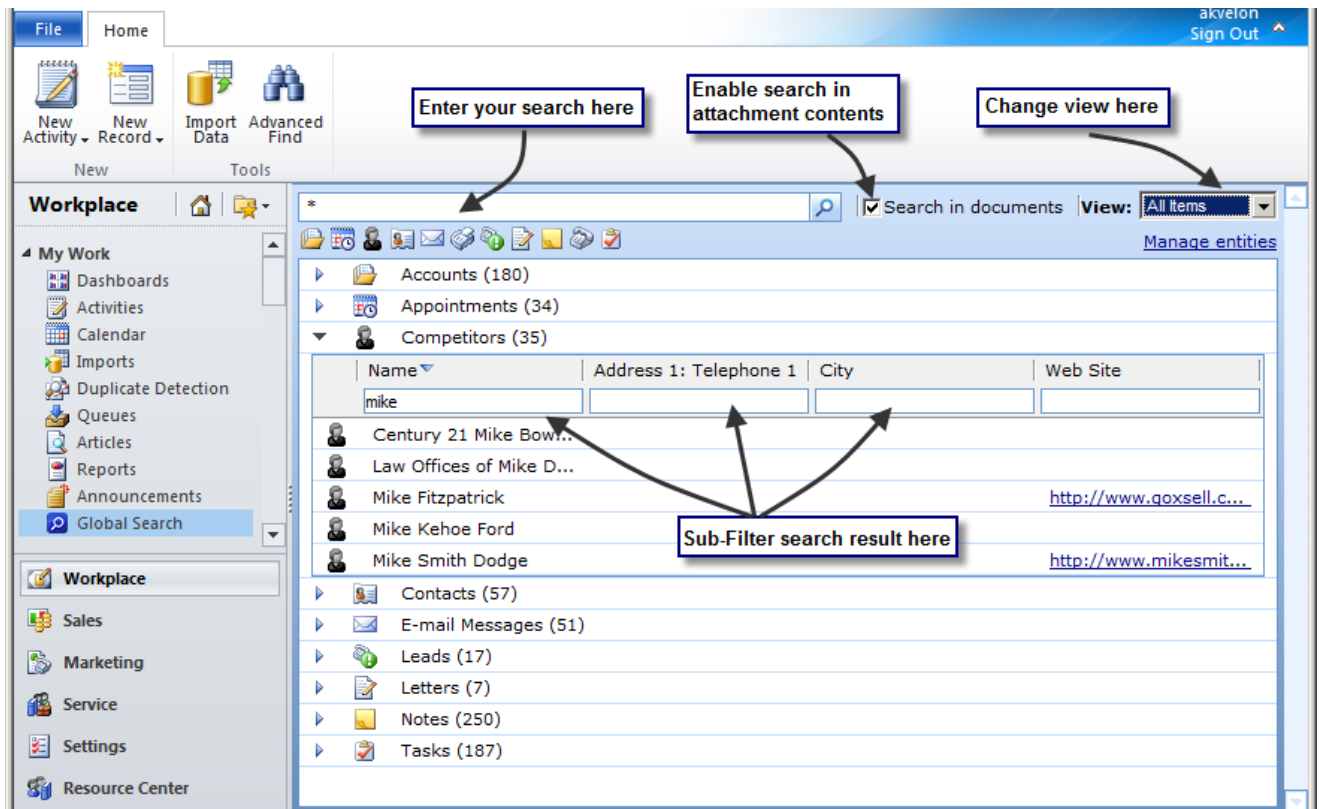


Figure 8 Searching with Akvelon Global Search

After the search is complete you will see all of the entity groups found. If you expand any of them you will see the list of found records. To open a specified record, double click on it.

Global Search supports two types of search views (choose view at the top-right corner):

- **All Items** – all items from all users (that user has access to) will be searched
- **My items** – only your items will be searched

**Note:** Entities and attributes that are searched and displayed can be configured in the **Global Search Settings** (for detailed information see Configuration section).

## Search Logic

Global Search performs searches of strings in all entities and attributes configured in the Global Search Settings.

Global Search performs case-insensitivity searches by the word-beginning search principle.

For example if you search for “Book” you can find entities that contain “book”, “Books”, “BOOKSHELF”, but not “eBook”.

## Wildcard Search

You can use an asterisk (“\*”) as a character to represent one or more other characters. For example:

If you search for “**sa\*t**”, found values will start with “s” and end with “t”, for example “**Salt**”, “**Saint**”, “**sacrament**” etc.

If you search for “**\*sam\***”, records with “sam” anywhere in the string will be found, for example “**sample**”, “**Samson**”, “**Grossam**”.

## Multiple Words Search


If several words are input, Global Search will find all records containing all of the words in their attributes (not obligatory in the same attribute).

For example if you search for “**Jack London**”, it will find a contact with name **Jack London**, and it will find all **Jacks** that have **London** in the “city” attribute (or in any other searchable attribute).

If you search for “**Seattle Art Museum**” it will find **Accounts** with the organization name “**Seattle Art Museum**” or contacts with city “**Seattle**” and “**Art Museum**” in description.

You can also use the asterisk symbol with Multiple Word Searches (see Wildcard Search section).

## Search the Contents of an Attachment

To make a search through attachment contents, type a word(s) into the search field, check **Search in Documents** and click the **Search** button  or press **Enter** (please ensure the Attachment Search is enabled, see the Configuring Attachment Search for more details).

## Custom Entity Search

Global Search 3.5 supports Custom Entity Searches (Search by Lookup fields). For example, the Contact entity can be related to the Account entity by the Primary Customer lookup field (see Figure 9)

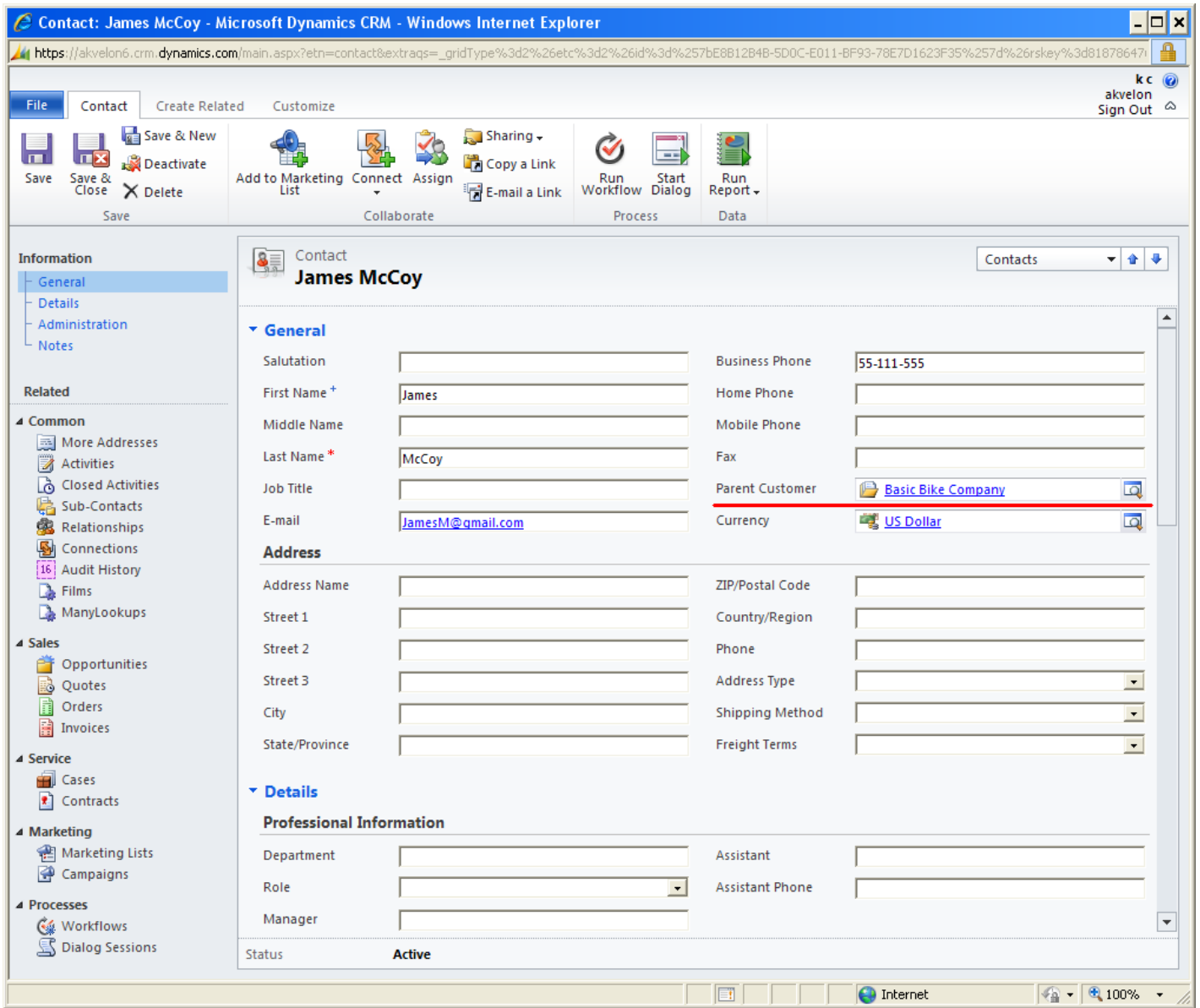


Figure 9 Relationship between Contact and Account

To add required attributes, go to **Settings** ->**GS settings**, select the entity, click **Edit Entity**. In **Attributes to Display** and **Attributes to search by** areas you can see required attributes (please see Figure 10).

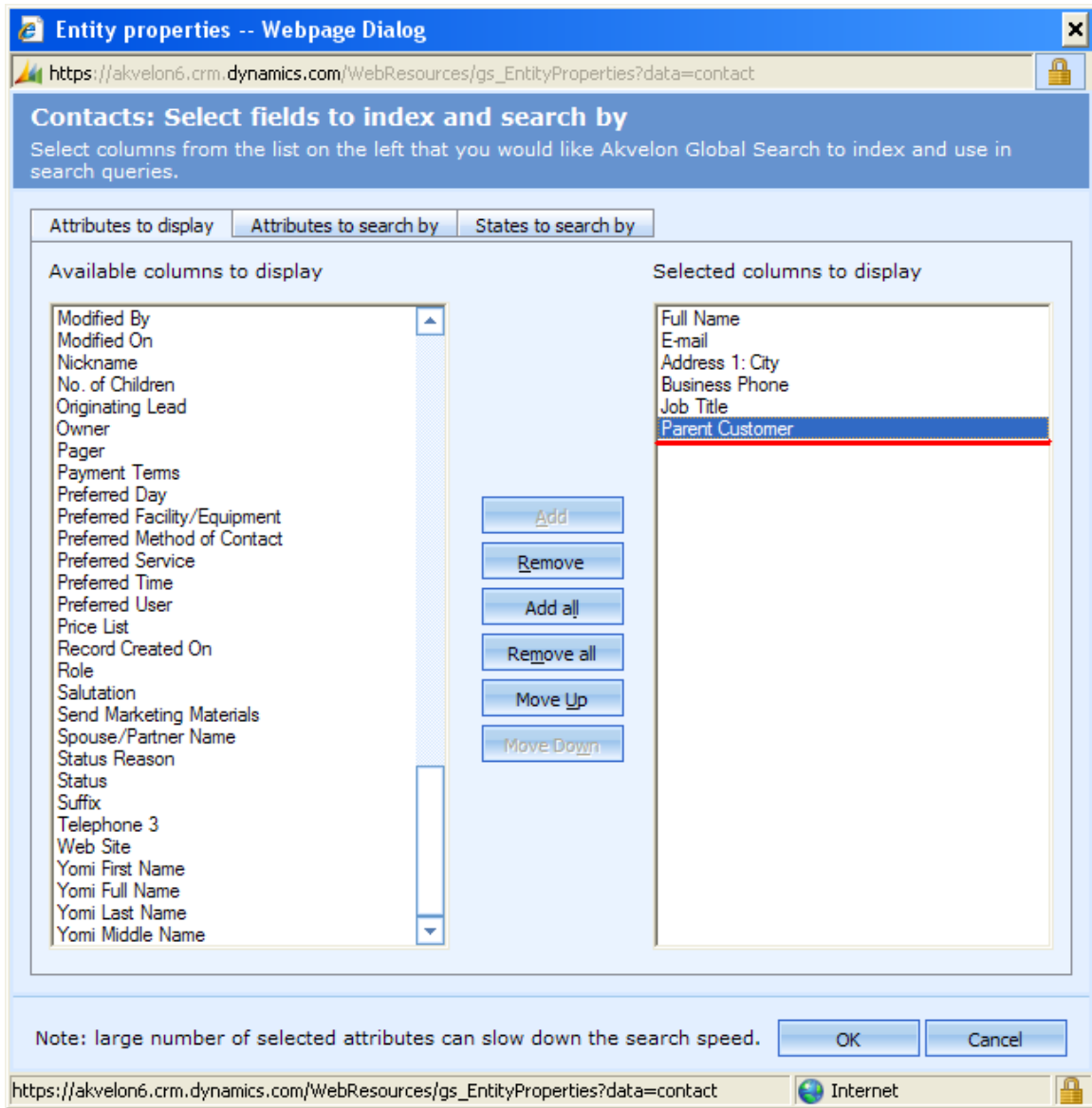


Figure 10 Search Lookup Settings

Add required attributes and click **OK**. The lookup fields are clickable. Related records will open by clicking the appropriate link (please see Figure 11).

Account Name	E-mail	Address 1: City	Main Phone
Basic Bike Company		Phoenix	555-0116

Full Name	Parent Customer	E-mail	Address 1:
James McCoy	Basic Bike Company	JamesM@gmail.com	

Figure 11 Search by Lookup Field

## Inside Column Filters

When more than five records are found in group, the additional column filters are shown. At the top of each column, there is a text box used to filter that specific column (see Figure 12).

By typing in the text box, you can narrow the number of rows in the table down to those that match your filter text.

Account Name	E-mail	Address 1: City	Main Phone	Address 1: Fax	Web Site
Grand		Re			
Grand Store (sa...	someone9@exa...	Redmond	555-0135		

Full Name	E-mail	Address 1: City	Business Phone	Job Title
		Red		
Adrian Dumitrascu (s...	someone_a@exempl...	Redmond	555-0156	Purchasing Assistant
Gabriele Cannata (sa...	someone_h@exempl...	Redmond	555-0168	Purchasing Assistant

- ▶ E-mail Messages (3)
- ▶ Leads (10)
- ▶ Phone Calls (11)
- ▶ Tasks (14)

Figure 12 Inside Column Filter

# Configuration

This chapter describes how to configure Global Search roles, entities, attributes to search by, and attributes to display, within results.

## Global Search Users Permissions

To allow users to use Global Search, you must assign them special permissions. To give Global Search permissions to user groups, go to **Settings -> Administration -> Users**. Select user(s) you want to provide with Global Search permissions and go to **Manage Roles** on upper CRM menu. Add “**Akvelon Global Search Users**” role to selected user(s) (see Figure 13). Click **OK** button.

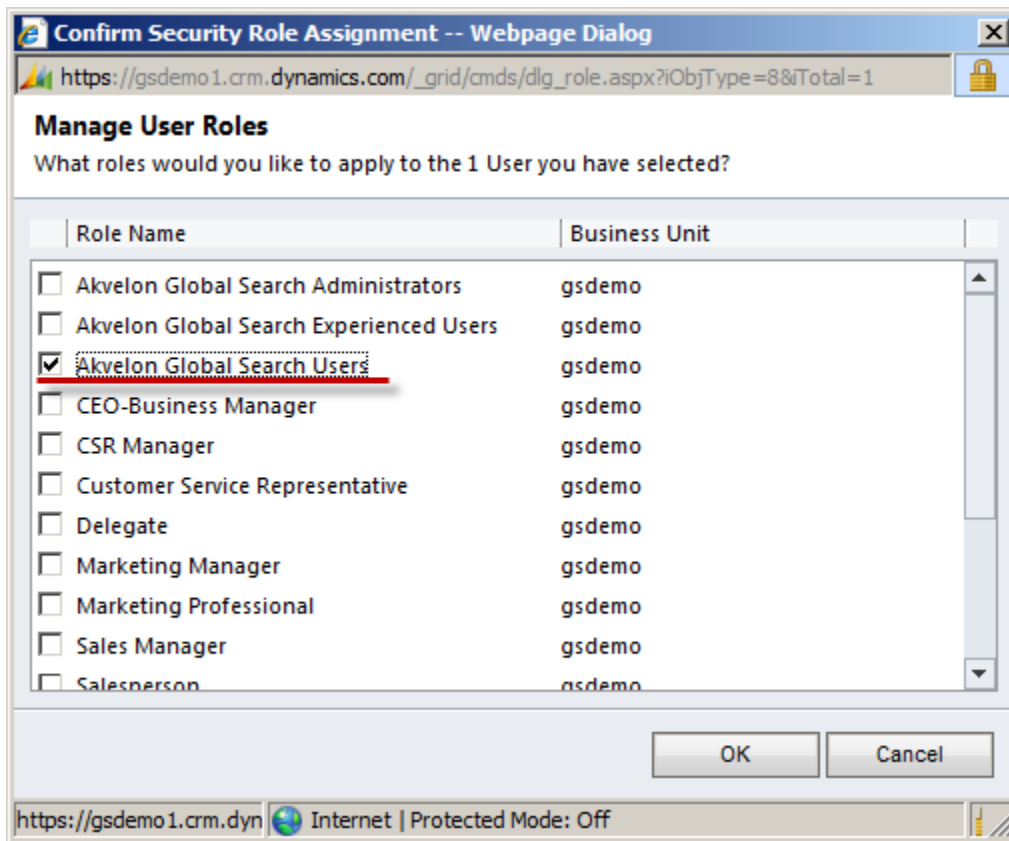


Figure 13 Global Search users permissions

To allow users to change Global Search settings (add and remove entities and attributes to search and display), you must assign them “**Akvelon Global Search Experienced Users**” (see Figure 14)

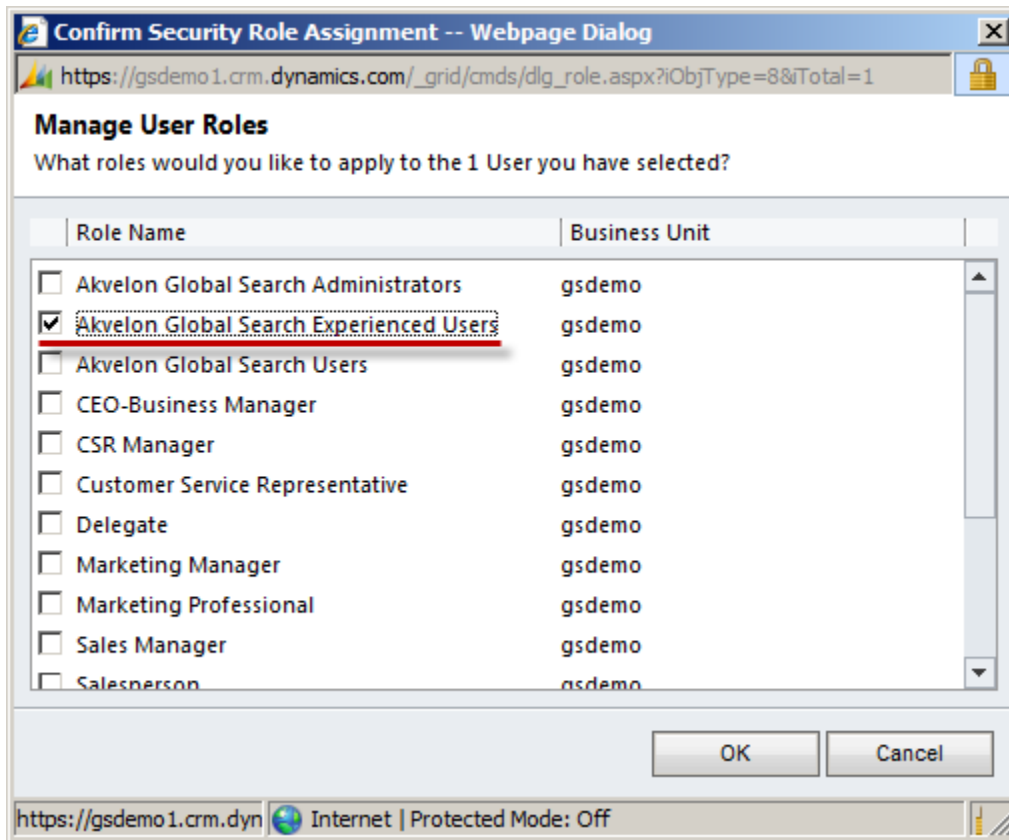


Figure 14 Manage User Roles

**Please note:** this role provides selected users with rights to Manage THEIR OWN Search Settings. It enables advanced functionality for your CRM users and **number of requests to your support team can be increased. Please enable this functionality only for experienced users and at your own risk.**

Users who have “**Akvelon Global Search Administrators**” can change Global Search settings for all users (see Save as Default Settings for Global Search Users section).

## Adding/Removing Entities to Search

By default, Akvelon Global Search is configured to search records in Accounts, Appointments, Competitors, Contacts, E-mail Messages, Faxes, Leads, Letters, Notes, Phone Calls and Tasks. You can reconfigure search entities, attributes, and display fields according to your business needs.

Follow these steps to add/remove the entities Global Search uses:

1. Go to the **Settings** area, and click **Global Search Settings** (see Figure 15). You will see the list of entities that are currently enabled for search.

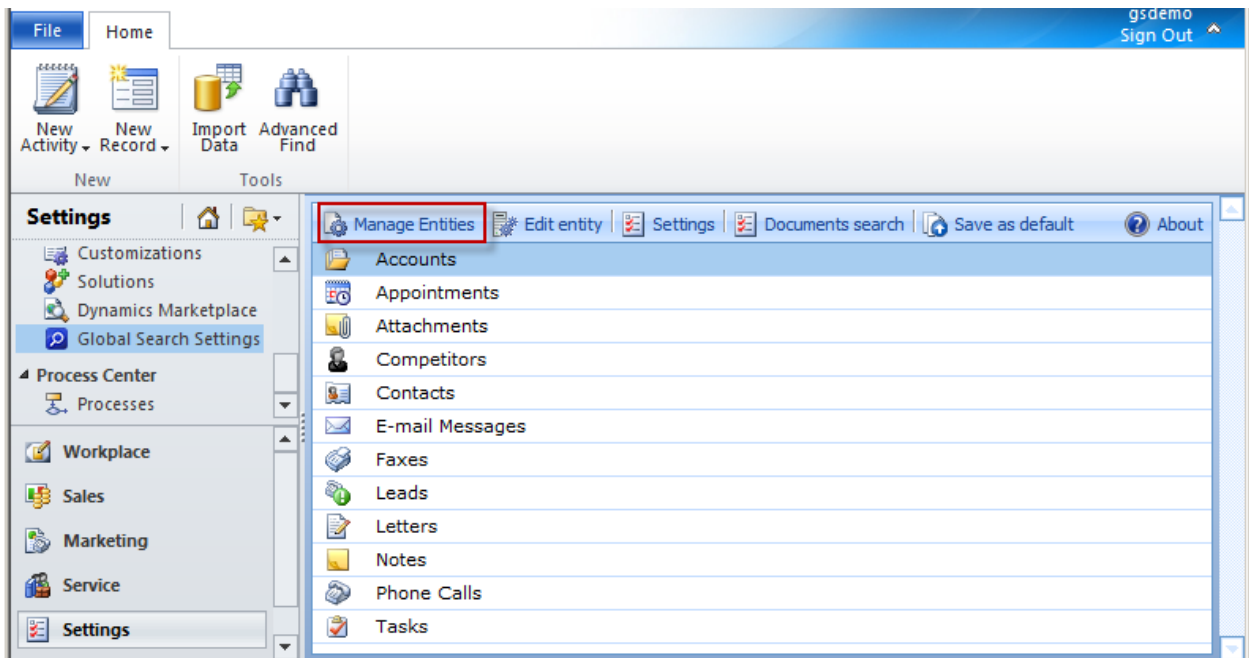


Figure 15 Global Search Settings

2. To add a new entity, click **Manage Entities** on the toolbar. Select the entities you want to enable in Global Search from the list (see Figure 16 ).

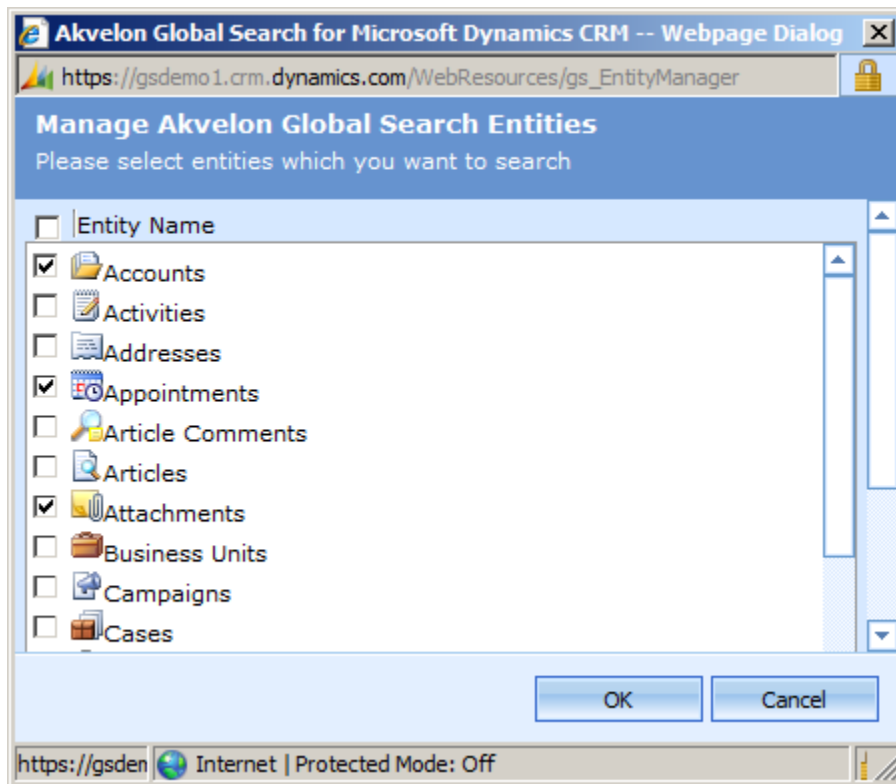


Figure 16 Manage Global Search Entities

**Please note:** Number of searched entities can affect search performance (too many entities selected can slow down the search).

After you click **OK** the entity will add to main Global Search Settings window with default settings. In this window you can change the default attributes to search and display (see Configuring Entity Properties section for details). To disable an entity for search, click **Manage Entities** and unselect this entity in the list. Click **OK** button.

## Configuring Entity Properties

For each entity enabled for Global Search you can customize the properties that are searched and displayed in the result columns. In the entities list, double-click the entity (or click **Edit** on the toolbar).

On the **Attributes to display** tab (see Figure 17), use the **Add/Remove** buttons to select the attributes you want to show in the results table. To change the order of the displayed columns, use the **Move Up/Move Down** buttons.

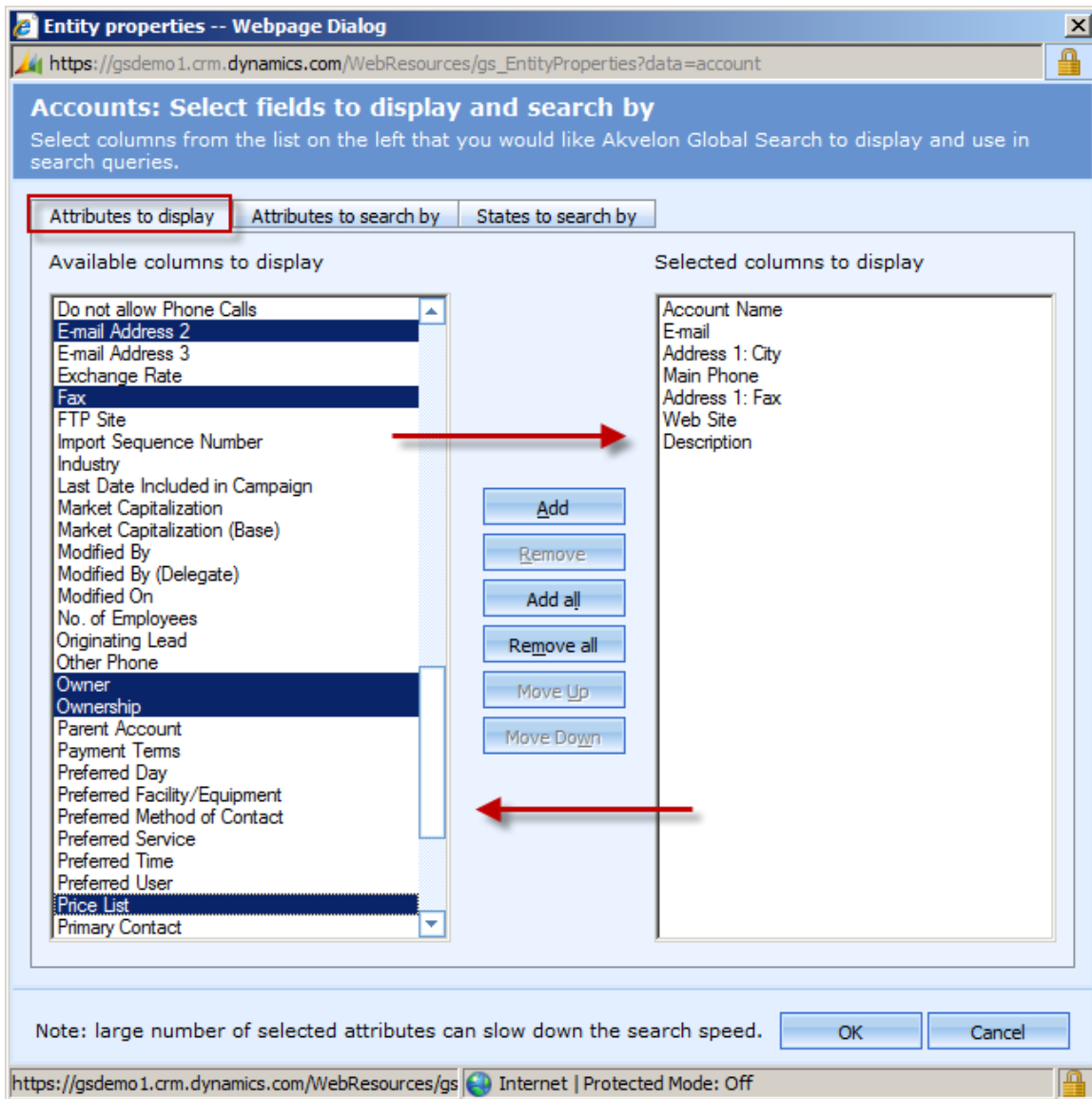


Figure 17 Attributes to display window

**Please note:** Number of Attributes to display can affect the search speed (too many selected Attributes can slow down the search).

On the **Attributes to Search by** tab (see Figure 18), select the entity attributes that will be used in search queries.

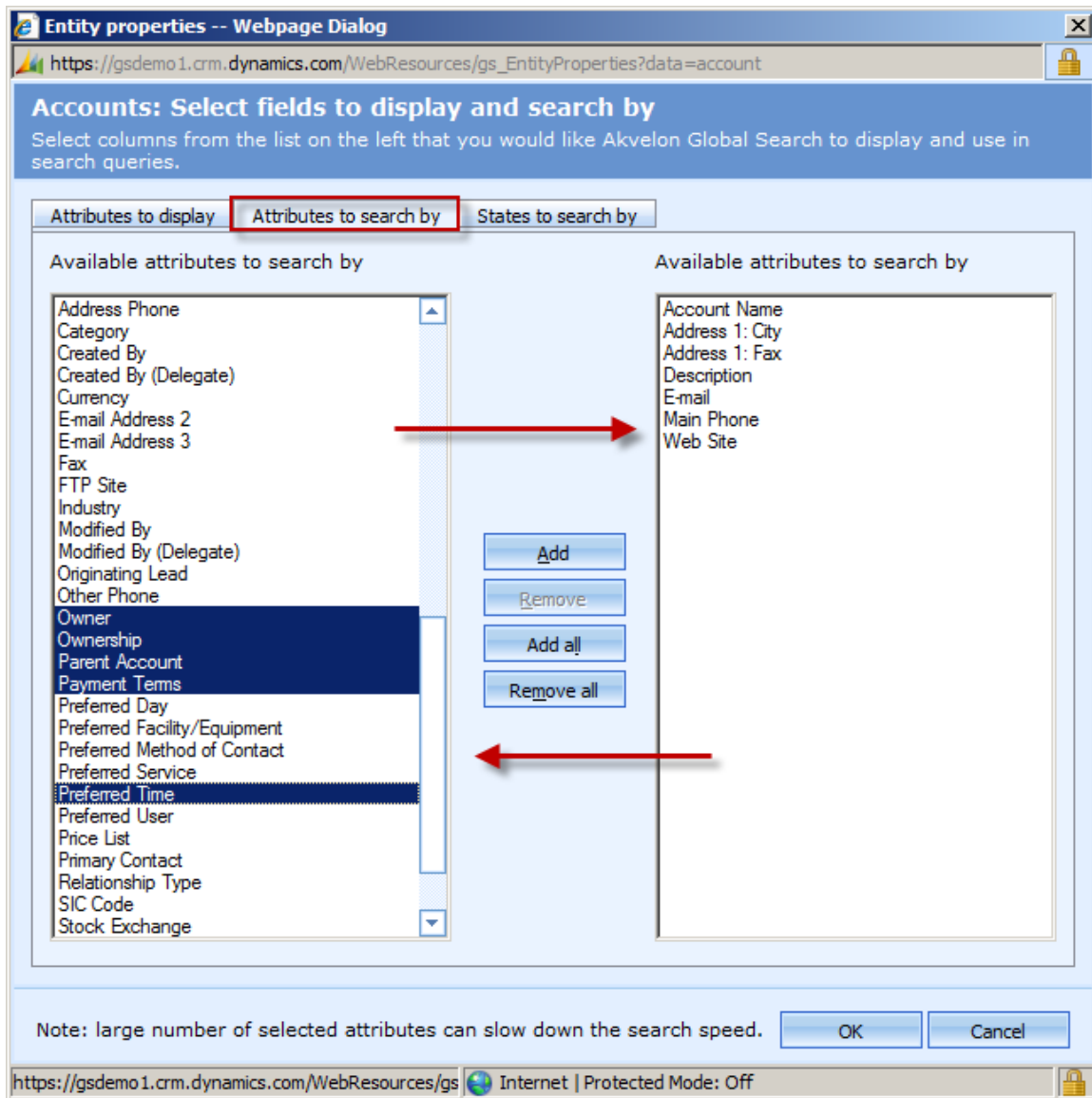


Figure 18 Attributes to search

**Please note:** Number of Attributes to search by can affect the search speed (too many selected Attributes can slow down the search).

In the **States to search by** tab you can choose the states to filter records (e.g. search only active records). If all states are selected, search results will not be filtered by state.

To apply new settings click the **OK** button.

## Configuring Entity Properties for Advanced Users

Users who have **Akvelon Global Search Experienced Users** role can change their own search settings directly from Global Search window. Click on Entity icon which you want edit. Entity Properties window will open (please see Configuring Entity Properties for more details). Click **Manage entities** to add or remove entities for search (see Figure 19).

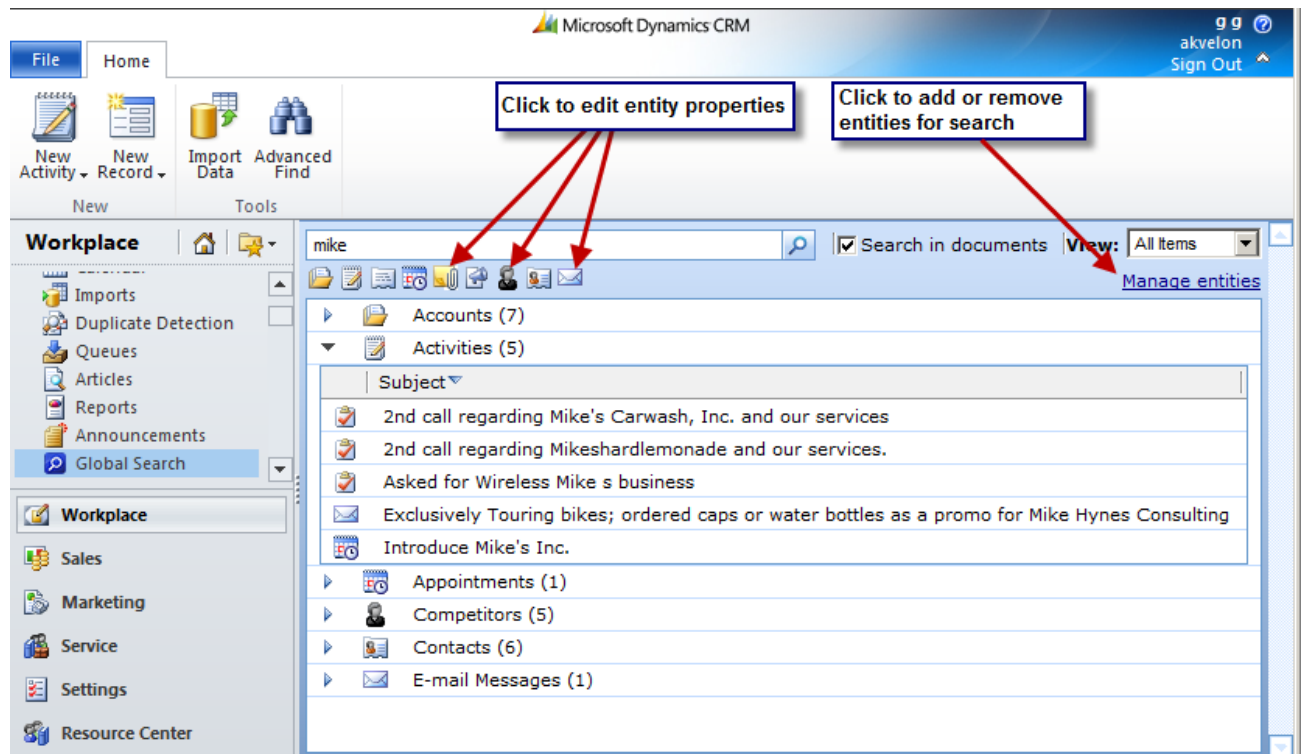


Figure 19 Quick search settings panel

## Configuring Maximum Number of Found Records

You can set a maximum number of found records for an entity group (there are 100 records by default). To do this, go to **Settings** -> **Global Search Settings** and click on **Settings** (the rightmost button in the settings tool bar). You can change this value to any number from 50 to 500 records (see Figure 20).

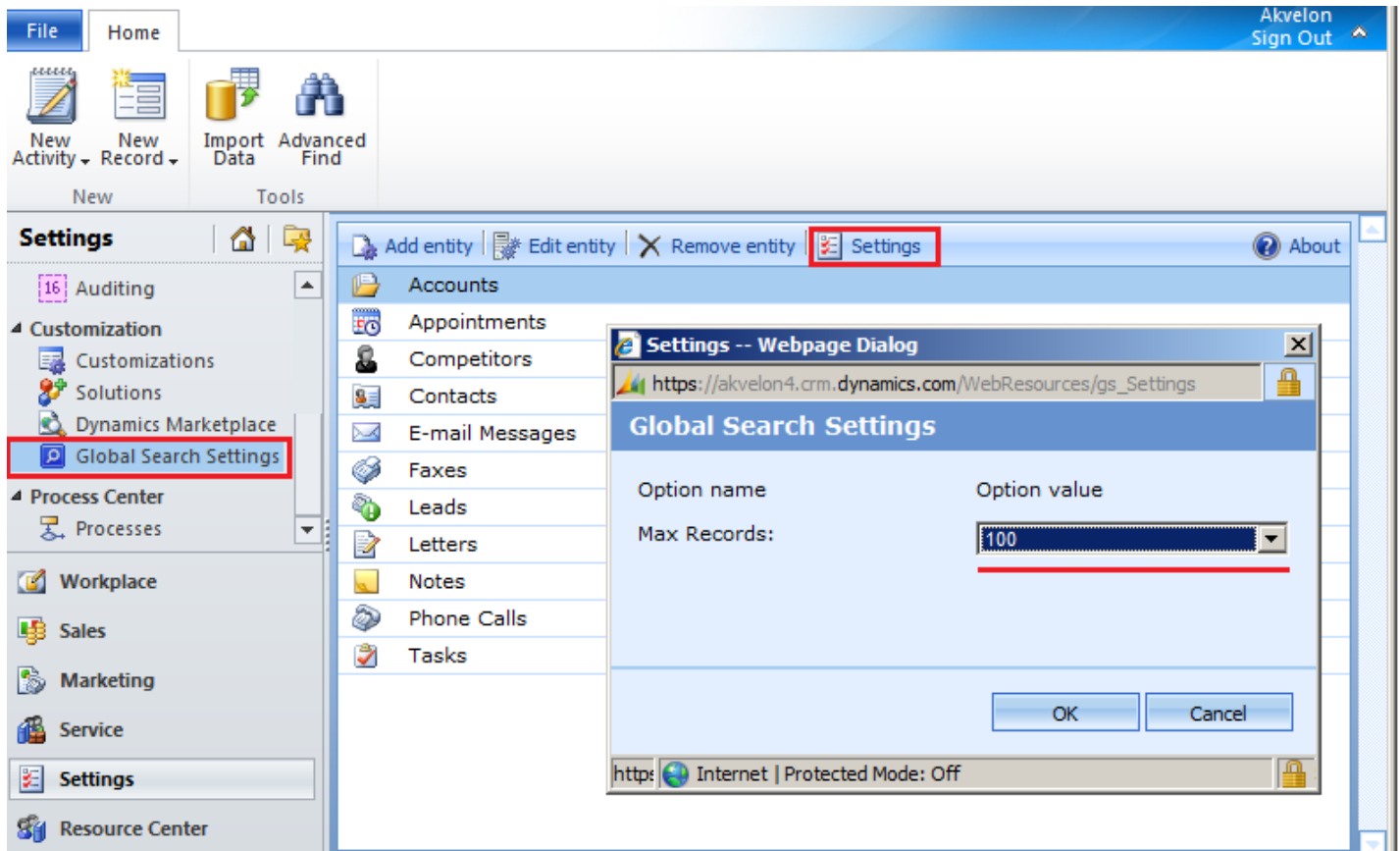


Figure 20 Configuring Maximum Number of Found Records

To apply new settings, click **OK**.

**Note:** Large values can slow down search performance.

## Save as Default Settings for Global Search Users

Changed Global Search settings can be applied for all users by one user with “**Akvelon Global Search Administrators**” role.

To apply changed search settings go to **CRM Settings -> Global Search settings -> click Save as Default** (see Figure 21)

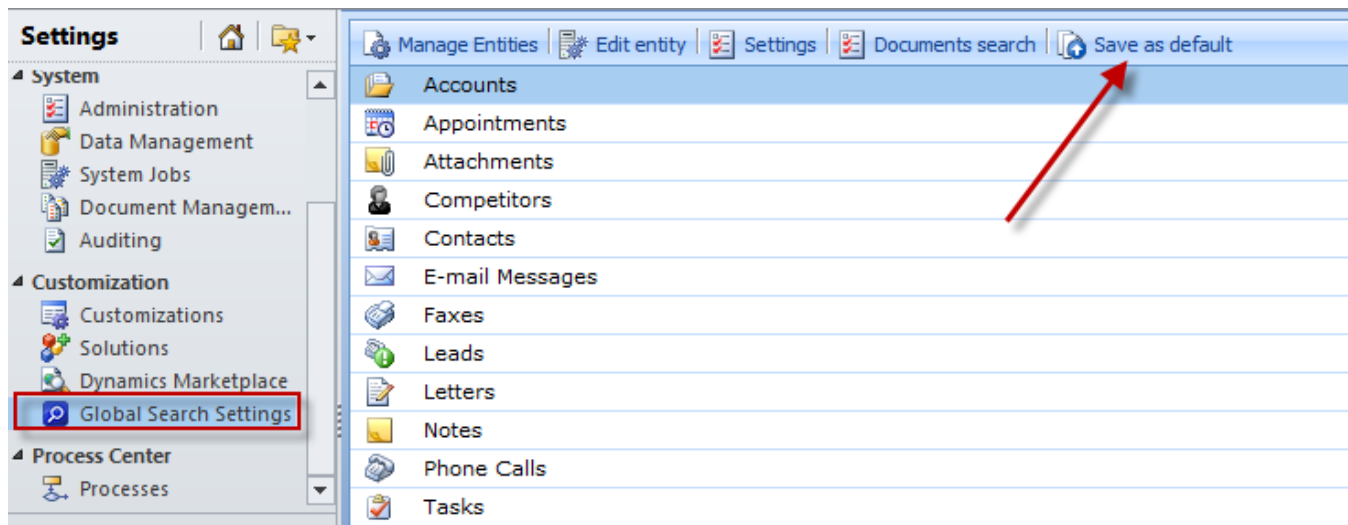


Figure 21 Save as Default button

Select **All Akvelon Global Search users** and click **OK** to apply settings for all users: both **Akvelon Global Search Users** and **Akvelon Global Search Experienced Users** (see Global Search Users Permissions section for more details)

Select **Only users with "Akvelon Global Search User" role** and click **OK** to apply settings only for users who have **Akvelon Global Search User** role (except **Experienced Users**) (see Figure 22)

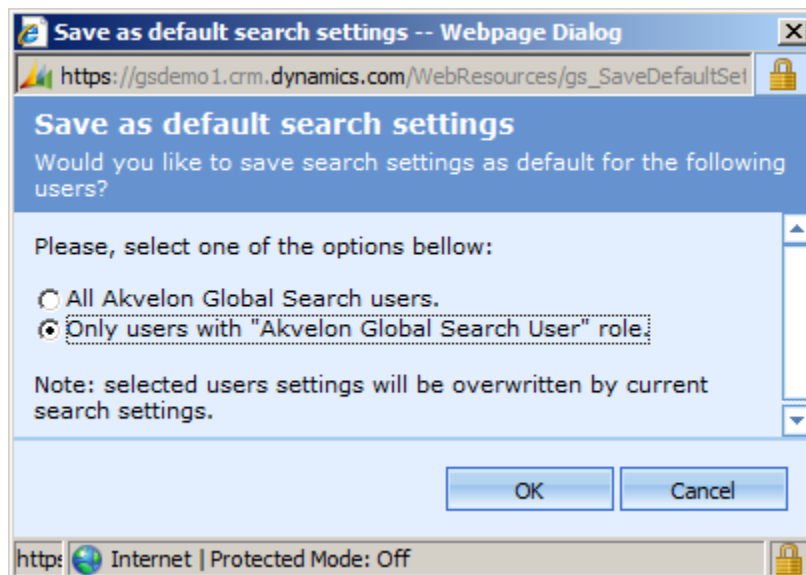


Figure 22 Select user roles to apply settings

## Configuring Attachment Search

To enable the Search Attachment feature, please follow these steps:

Go to **CRM Settings** -> **GS Settings**. Make sure **Notes** and **Attachments** is added to Global Search Setting then click the **Document Search** button (please see Figure 23)

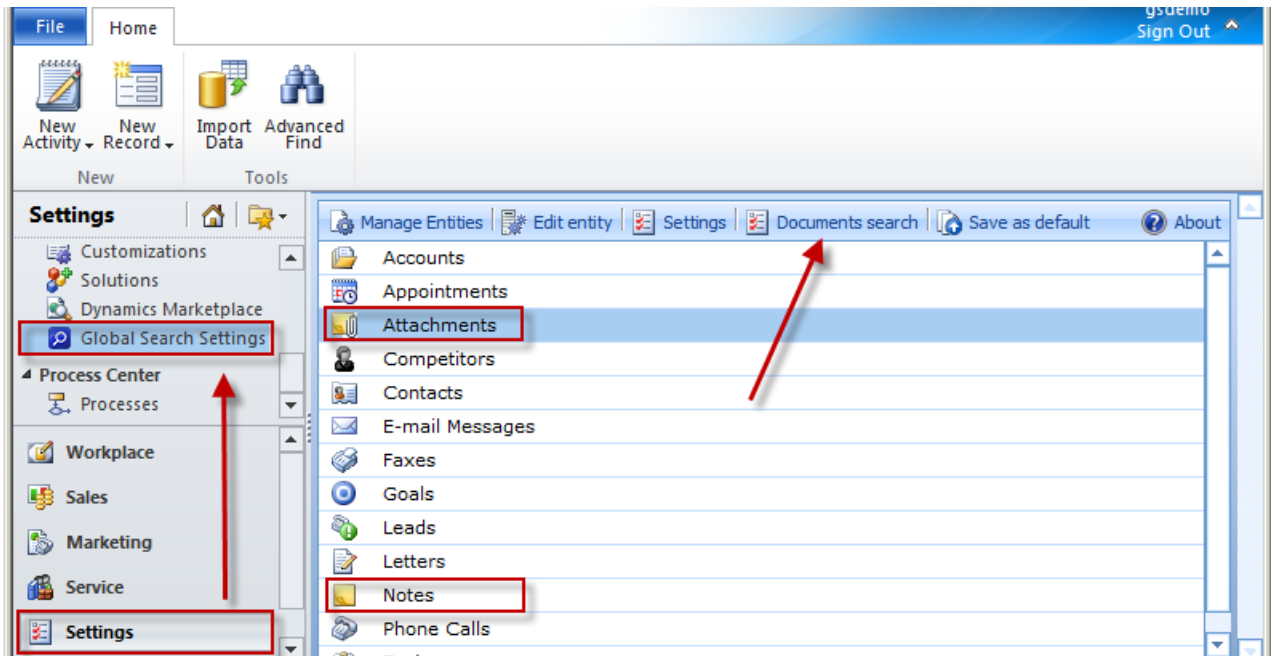


Figure 23 Documents search button

Documents Search Configuration will open (see Figure 24)

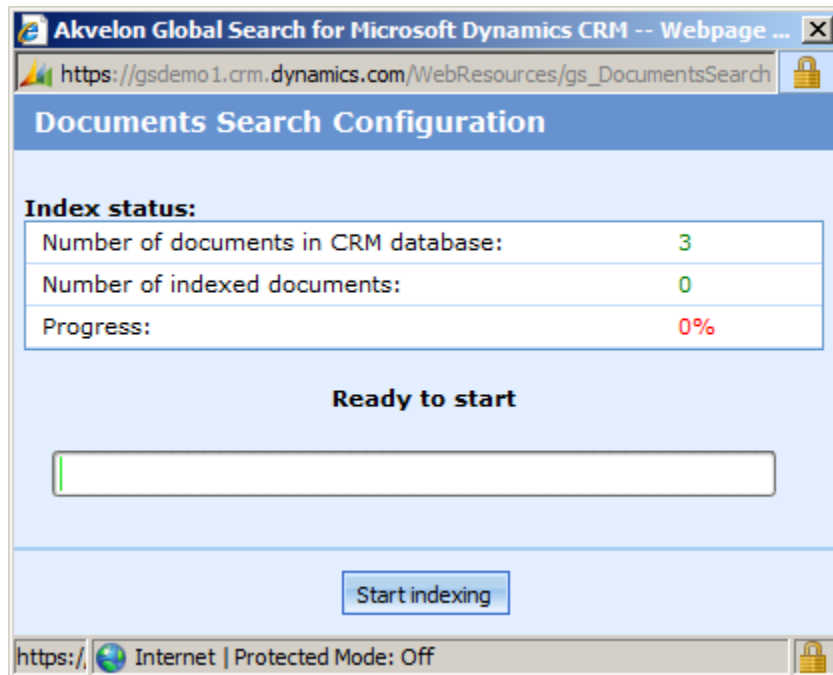


Figure 24 Document Search Configuration window

In this window you can see Number of Documents in CRM database, Number of indexed documents and Indexing progress status. **To enable search in the documents** you must perform initial indexing of CRM Database. Click **Start indexing** button to start indexing process. When indexing will be completed Attachment search functionality will be available (see Figure 25).

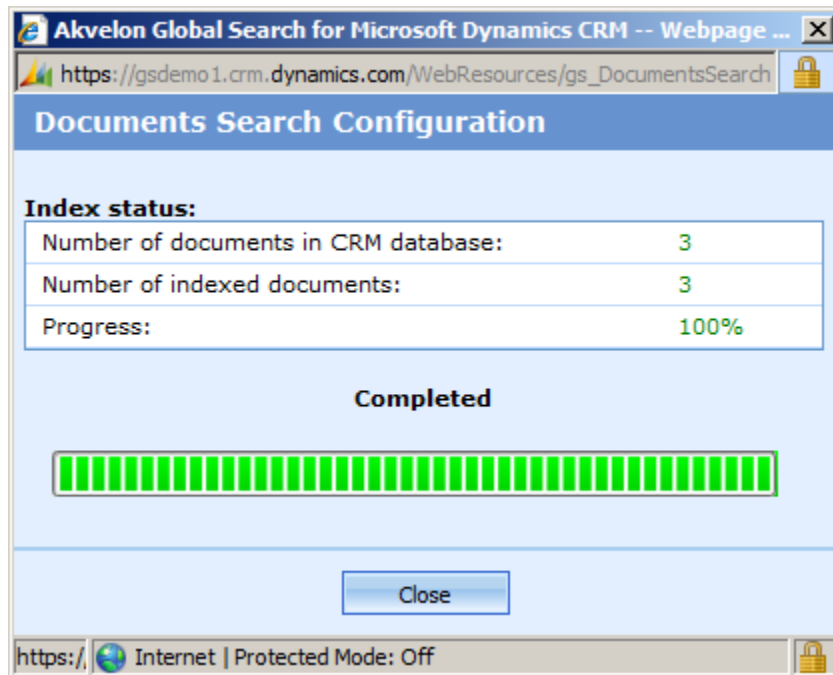


Figure 25 Documents Indexing Progress Status

**Please note:**

1. Entity "Notes" and "Attachments" should be added to Global Search Settings
2. **Full indexing can take from several minutes to several hours depending on the amount of documents in the system**
3. You will be able to search newly added attachments after the Attachment Search indexing occurs within the CRM Database (Crawler will perform indexing every 15 minutes).

## Configuring Email indexing

Email Indexing provides ability to improve searching performance in the Dynamics CRM emails description. Searching performance becomes much better.

**Please note:**

1. Email indexing process can take up to several hours depending on amount and size of the emails in the CRM Database.
2. We strongly recommend start email indexing process when CRM users do not work with CRM (non-working time).
3. Email Index requires additional storage to create indexes. Please make sure you have free space on your storage on Dynamics CRM Online deployment (indexes can take about 5%-20% of CRM emails volume). To verify storage usage, go to **CRM Settings-> Administration-> Subscription Management (Storage)**.

**To enable the Email Indexing feature, please follow these steps:**

Go to **CRM Settings** -> **Global Search Settings** -> click the **E-mail Indexing** button (see Figure 26).

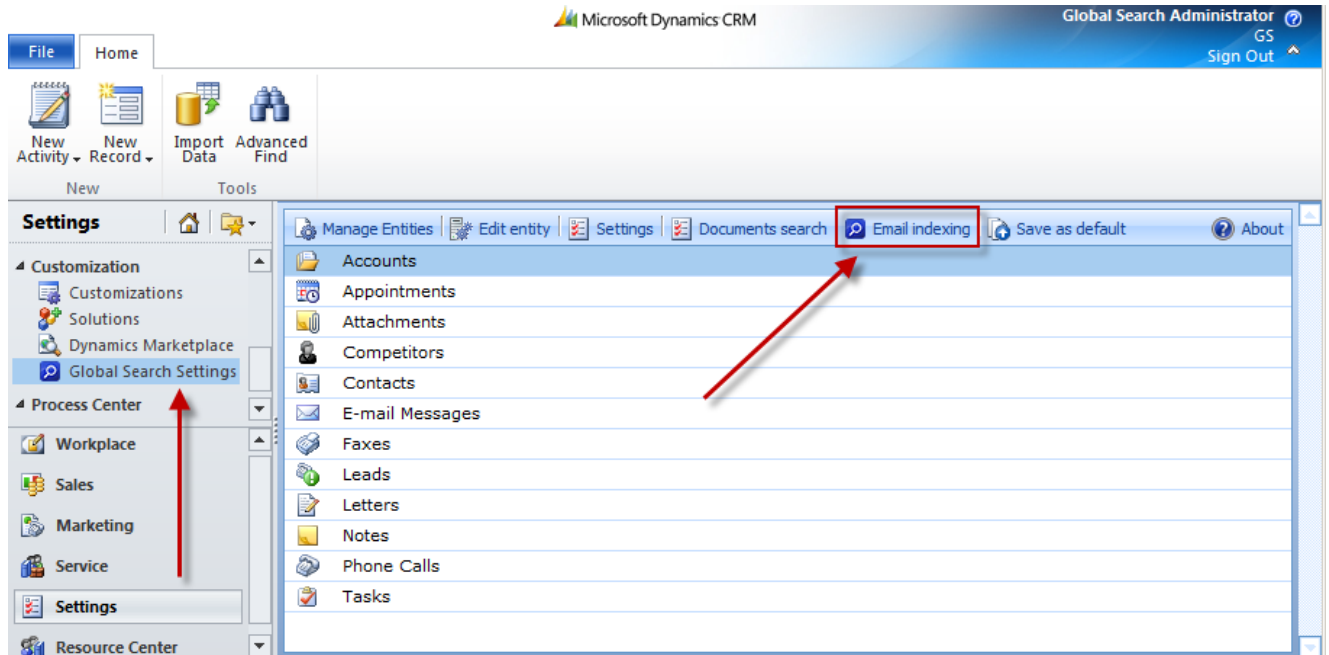


Figure 26 Email Indexing button

E-mail Indexing configuration window will be open (see Figure 27). Wait a couple of seconds to complete Initialization process. When Initialization process will be completed, you'll see the **Index status** window: Number of emails in the Dynamics CRM Database, Number of indexed emails and email indexing progress status. Also the **Enable E-mail Index...** button will appear after the Initialization process (see Figure 28).

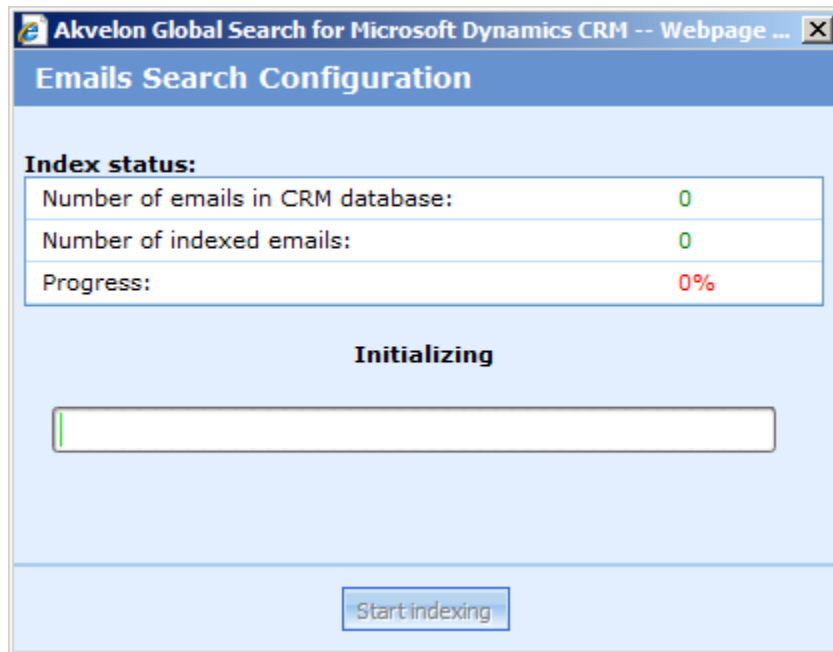


Figure 27 Email Indexing Initializing

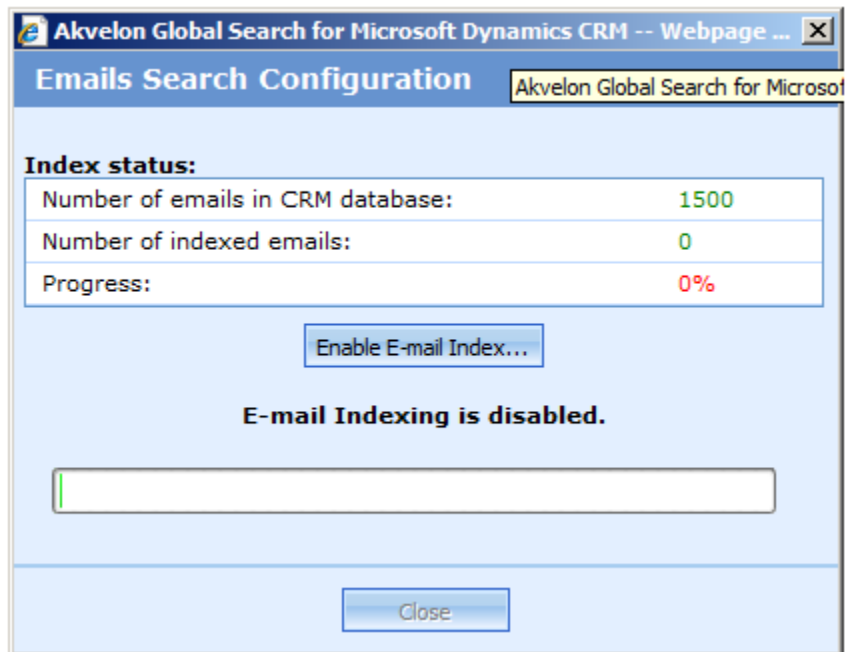


Figure 28 Email Indexing status

Click the **Enable E-mail Index...** button to start full e-mail indexing process (**please read notes above before starting email indexing**). Then click the **Start indexing** button. In the appeared dialog box click OK button to start email indexing process or click Cancel to prevent this action (see Figure 29).

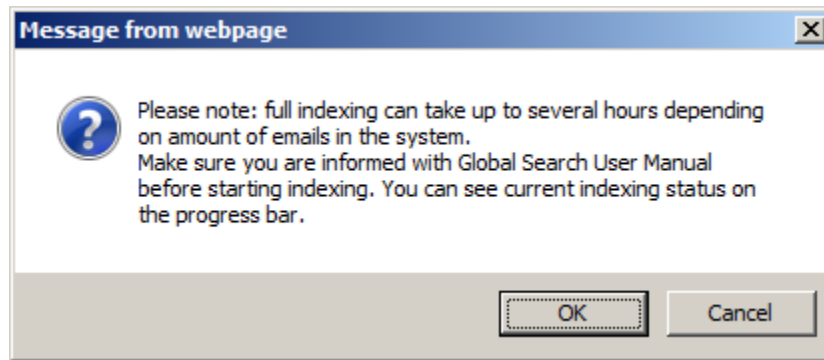


Figure 29 Confirm dialog

You can see the current indexing status in the Email indexing window (see Figure 30). We don't recommend close the window during indexing progress – it speed up indexing process. If you close the window, email indexing process will prevent, but indexing will resume in background periodically, so all **new email messages will be indexed automatically**. Also you can open the Email indexing window at any time and start indexing again manually.

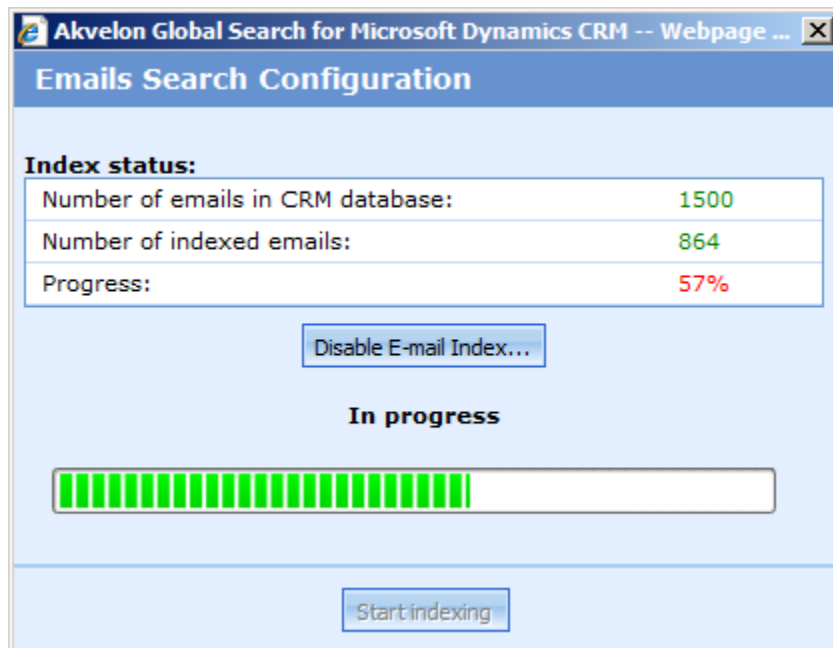


Figure 30 Email indexing progress status

If E-mail Indexing process was successfully completed, Indexing status will change to "Completed". Also you can see number of indexed emails in your Dynamics CRM Database (see Figure 31).

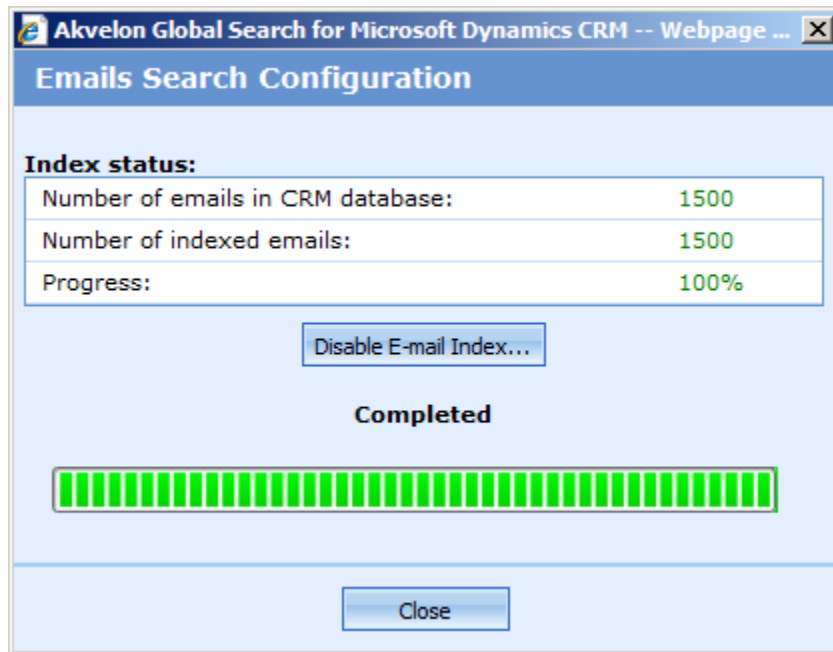


Figure 31 Email Indexing completed

Now you can add "Description" in the "Attributes to search by" tab for the "E-mail Messages" entity (please see Adding/Removing Entities to Search section).

### **Disabling E-mail Index**

To disable E-mail Indexing, go to **CRM Settings -> Global Search Settings** and click the **E-mail Indexing** button at the top menu. The E-mail Index window will open. Click the "**Disable E-mail Index...**" button. Click OK in appeared dialog to start disabling process.

#### **Please note:**

1. **Indexed data will NOT be removed** from the system
2. We strongly recommend remove "Description" in the "Attributes to search by" tab for the "E-mail Messages" and "Activities" entities (please see Adding/Removing Entities to Search).

**Removing E-mail Index:** to completely remove indexed data from the system, remove Global Search from your Dynamics CRM system (see Uninstall Global Search section).

## Feedback

If you have any questions, experience problems, or have feedback – please feel free to contact us: [gs.support@akvelon.com](mailto:gs.support@akvelon.com).

The Akvelon team encourages and appreciates leaving feedback about Akvelon Global Search at the [CRM Dynamics Marketplace](#) site.

