Global Search v 6.1
for Microsoft Dynamics CRM Online
(2013, 2015 & 2016 versions)

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 Online 2013, 2015 & 2016.

Global Search for Microsoft CRM 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
- Export search results to Excel

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Licensing

Whether you are using Microsoft Dynamics CRM 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 or visit akvelon.com.

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Installation

Upgrading from previous versions

To upgrade from previous versions of Global Search to 6.1.x, download new version from Akvelon.com site and install it (NO NEED TO REMOVE previous version). During installation, select the **Maintain customizations (recommended)**, and check the **"Activate any processes and enable SDK messages..."** (see Global Search Installation section for more details).

Moving CRM Online database to CRM On-premise (and vice versa)

Please completely remove Global Search before moving your CRM Online database to CRM On-premise server. After moving database, install appropriate version of Global Search to your CRM server (the latest version of Global Search can be downloaded from http://akvelon.com, Products menu).

Please note:

1. New license key for CRM On-premise is required, the license key for CRM Online doesn't support CRM On-premise (please contact gs.support@akvelon.com for more details).
2. Global Search settings from CRM Online will be lost.

Global Search Installation

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

1. Download Akvelon Global Search by the following link: http://www.akvelon.com/products/global-search-for-ms-crm-online
2. Log on to your Microsoft Dynamics CRM server using an account that has administrative privileges (System Administrator).
3. Allow pop-up windows in your web browser for CRM website:
   - Internet Explorer: http://windows.microsoft.com/en-us/internet-explorer/ie-security-privacy-settings
   - Google Chrome: https://support.google.com/chrome/answer/95472?hl=en
   - Mozilla Firefox: https://support.mozilla.org/en-US/kb/pop-blocker-settings-exceptions-troubleshooting
4. Go to **Settings** -> **Solutions**
5. Click the **Import** button (see Figure 1)

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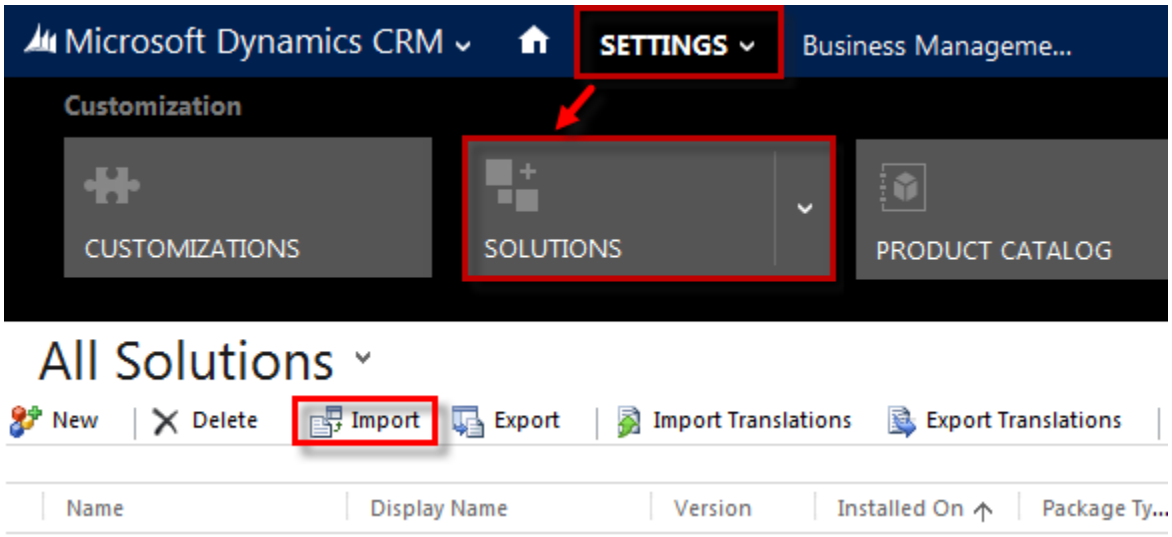

Figure 1 Import Global Search solution

6. Follow the Import wizard.

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

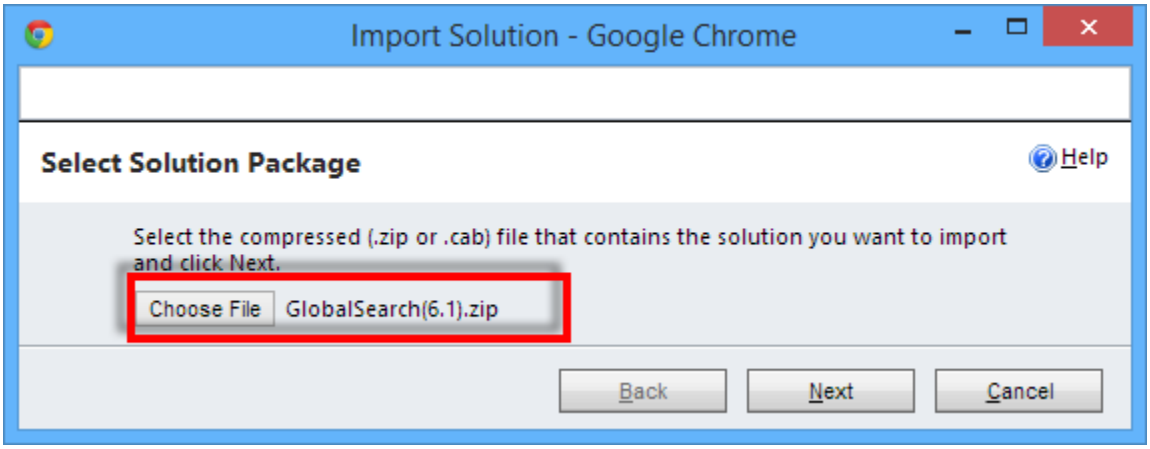

Figure 2 Select the Global Search solution

   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)

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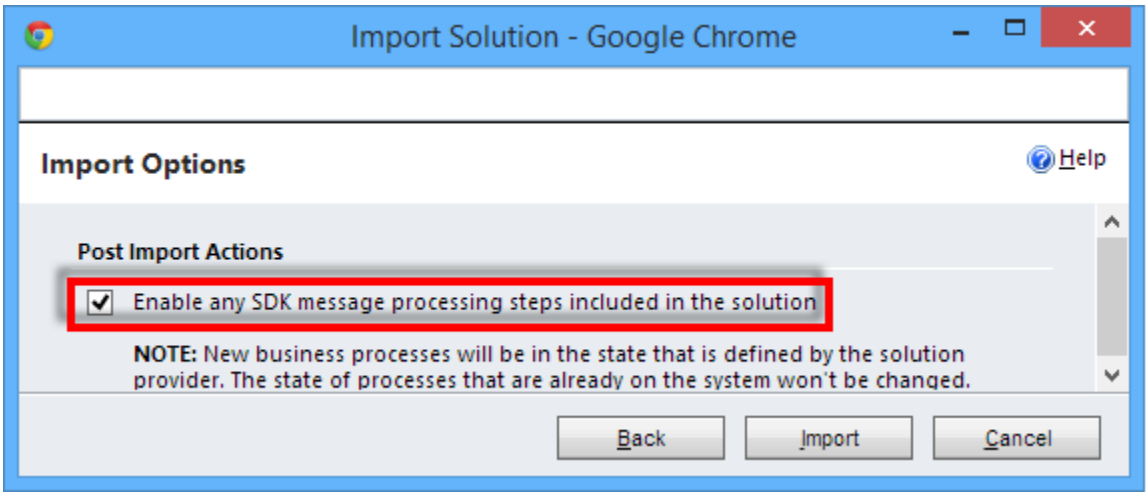

Figure 3 Activate any processes and enable SDK message

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 doesn't 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).**

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Activation

Activate Global Search separately for each organization.

Before activation, **make sure that pop-ups are not blocked by your internet browser for your CRM site**. 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 2Figure 4).

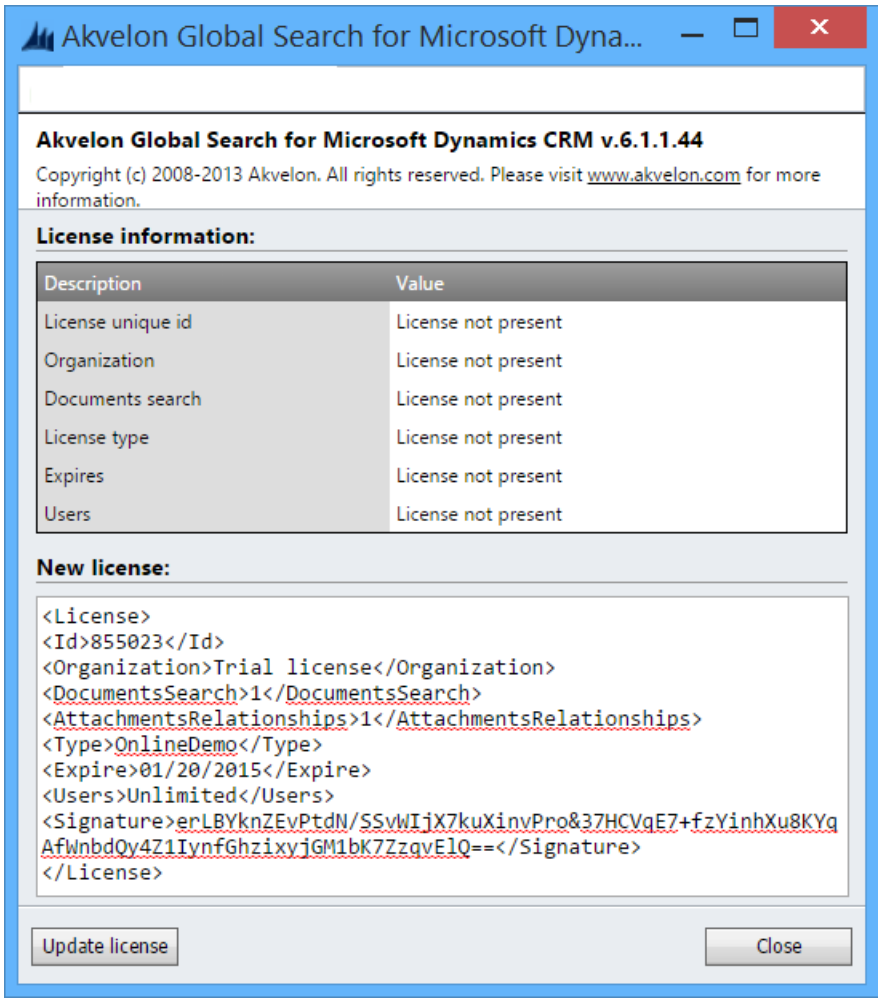

Figure 4 Activate Global Search

Please note:

1. You can get the free 14-day trial version of Global Search from akvelon.com.

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2. Visit akvelon.com or contact gs.support@akvelon.com to purchase Akvelon Global Search for Microsoft Dynamics CRM Online.

Updating License Data

If you need to update license data (e.g. to input commercial license instead of trial, update number of users, prolong your commercial license 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.

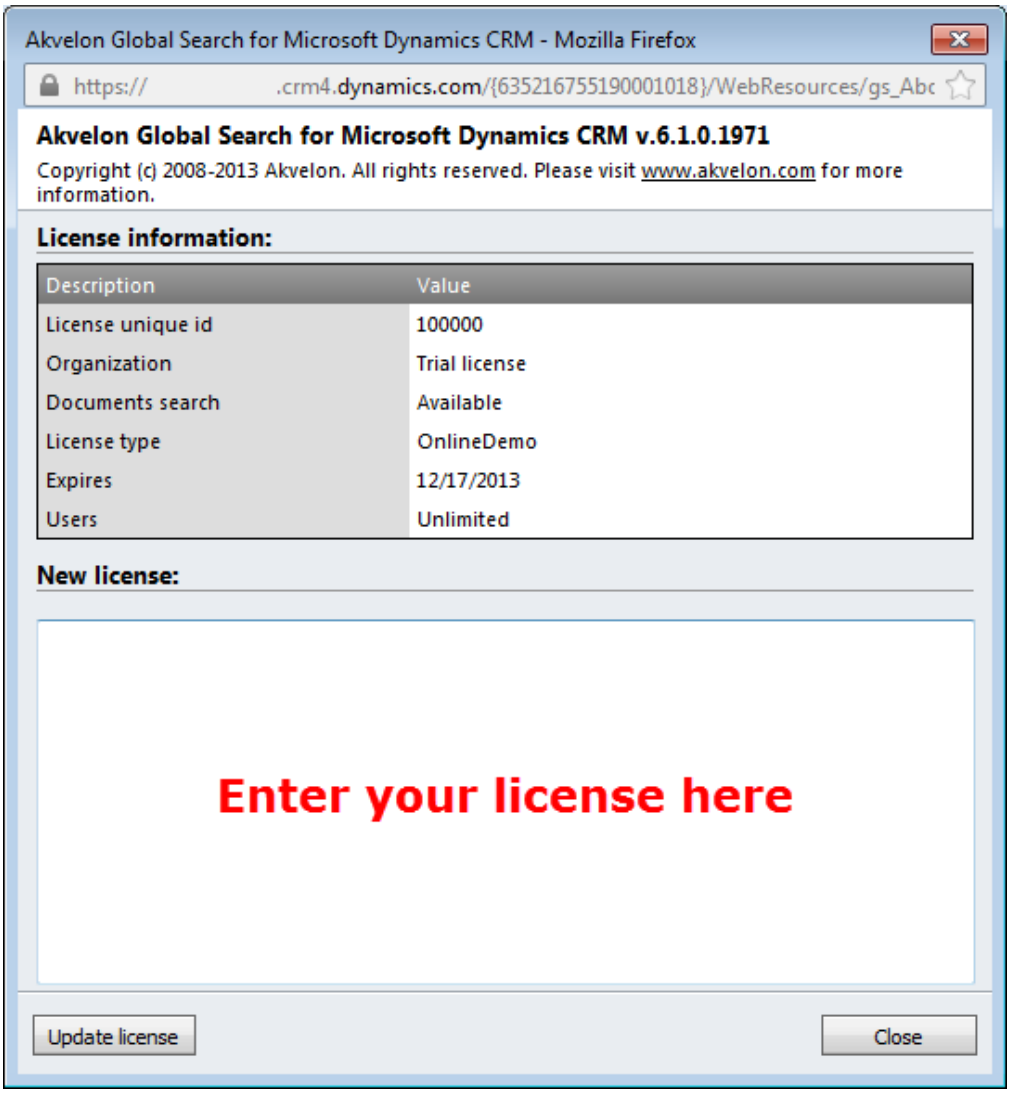

Figure 5 Update Global Search license

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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)

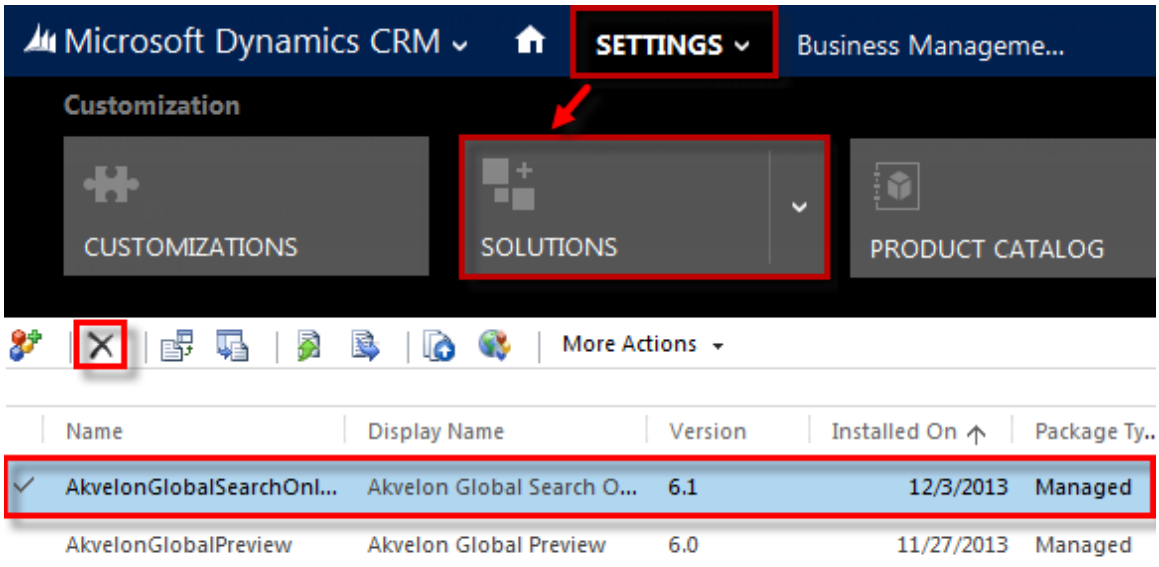

Figure 6 Uninstall Global Search

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

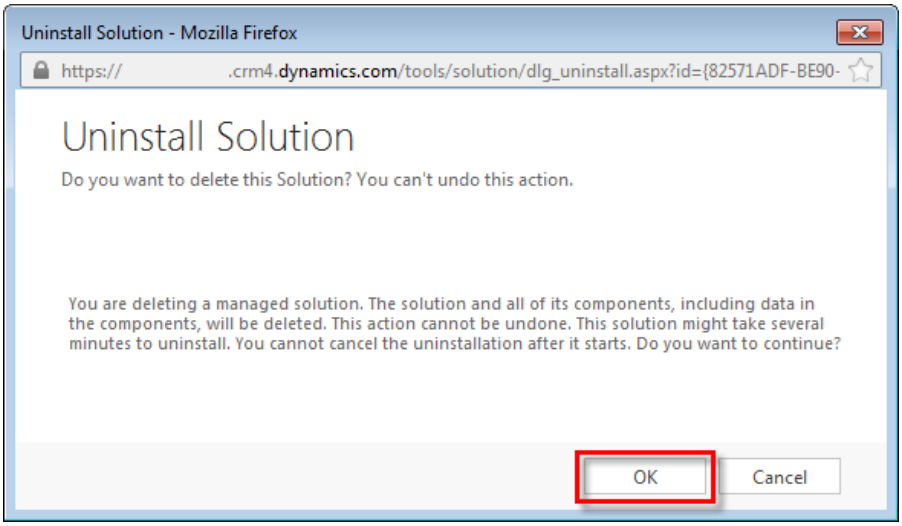

Figure 7 Confirm Deletion dialog

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Searching with Akvelon Global Search

Akvelon Global Search can search various data items (such as customers, accounts, activities and etc.) in a single query. Global Search includes cross-browser support. It means that you can use your favorite browser (IE, Chrome, Firefox or Safari) to search in Dynamics CRM.

To use the search, go to one of the panes where the Global Search link was added (Sales, Service, Marketing), and select the Global Search section. Type a word(s) into the search field and click the Search button or press Enter (see Figure 8).

Note: If you use customized sitemap and Global Search link is not appeared there, please contact Global Search support for assistance: gs.support@akvelon.com.

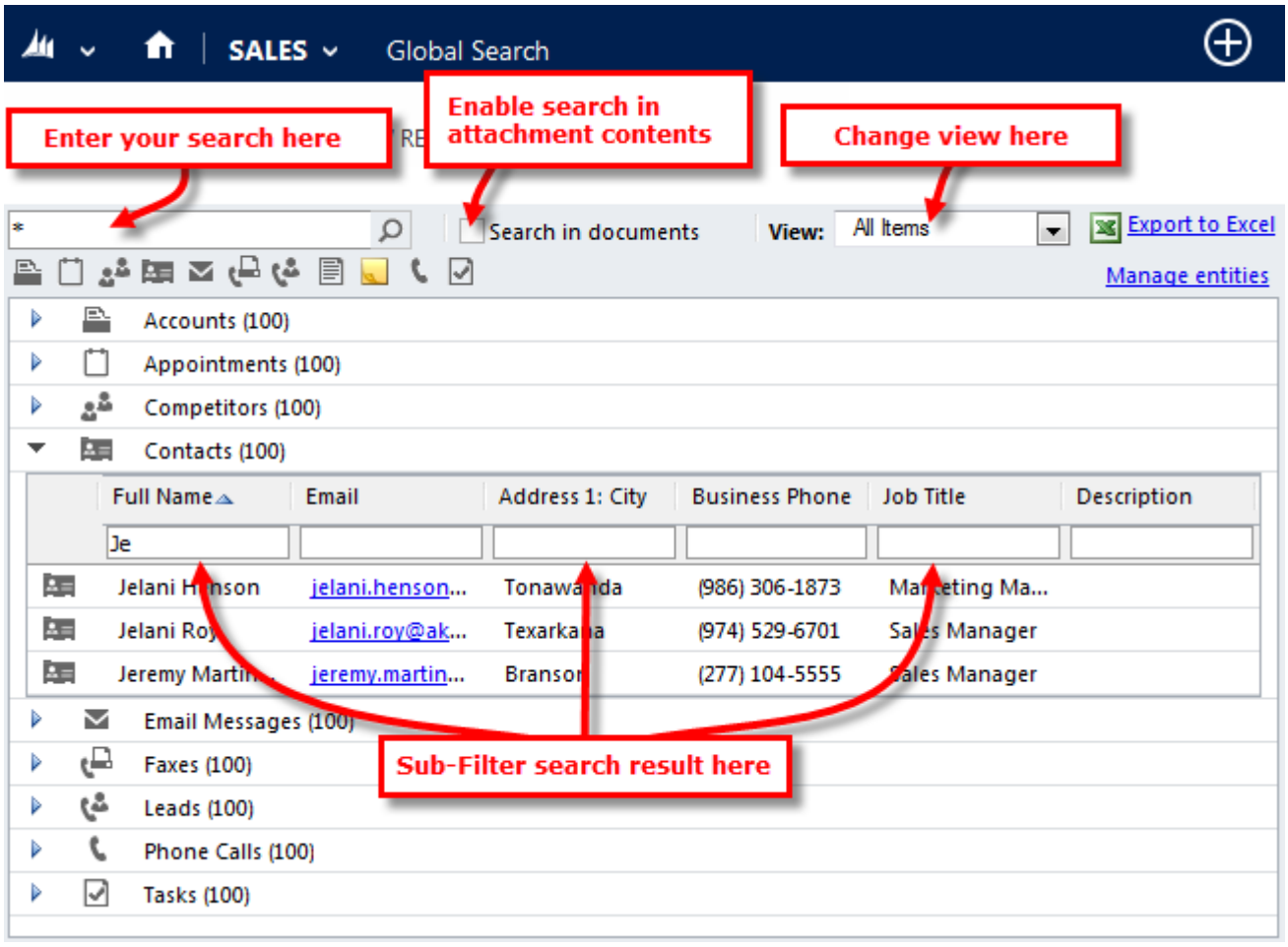

Figure 8 Searching with Akvelon Global Search

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. Also, Global

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Search provides ability to highlight search keywords in search results (see Enable/Disable Highlighting Keywords section for more details).

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).

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Custom Entity Search

Akvelon Global Search supports Custom Entity Searches (Search by Lookup fields). For example, the Opportunity entity is related to the Account entity (see Figure 9).

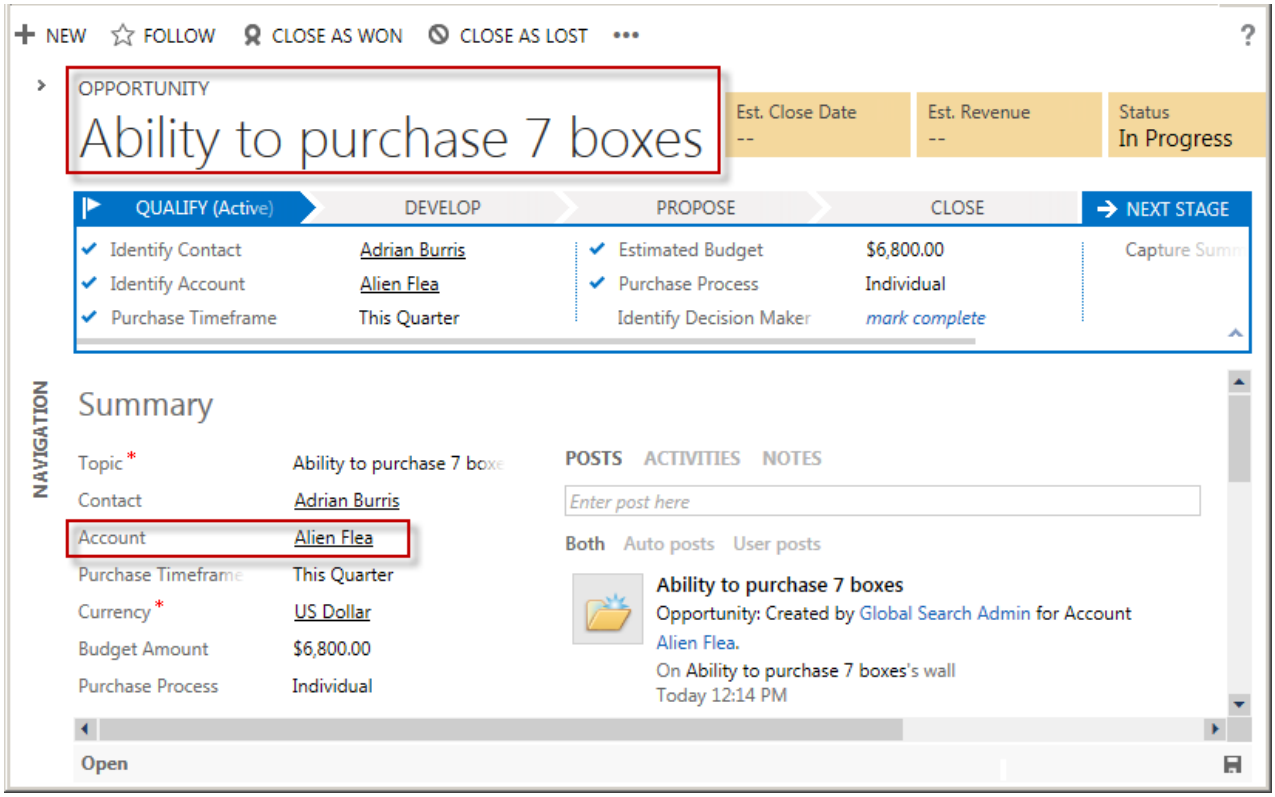

Figure 9 Relationship between Opportunity and Account

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

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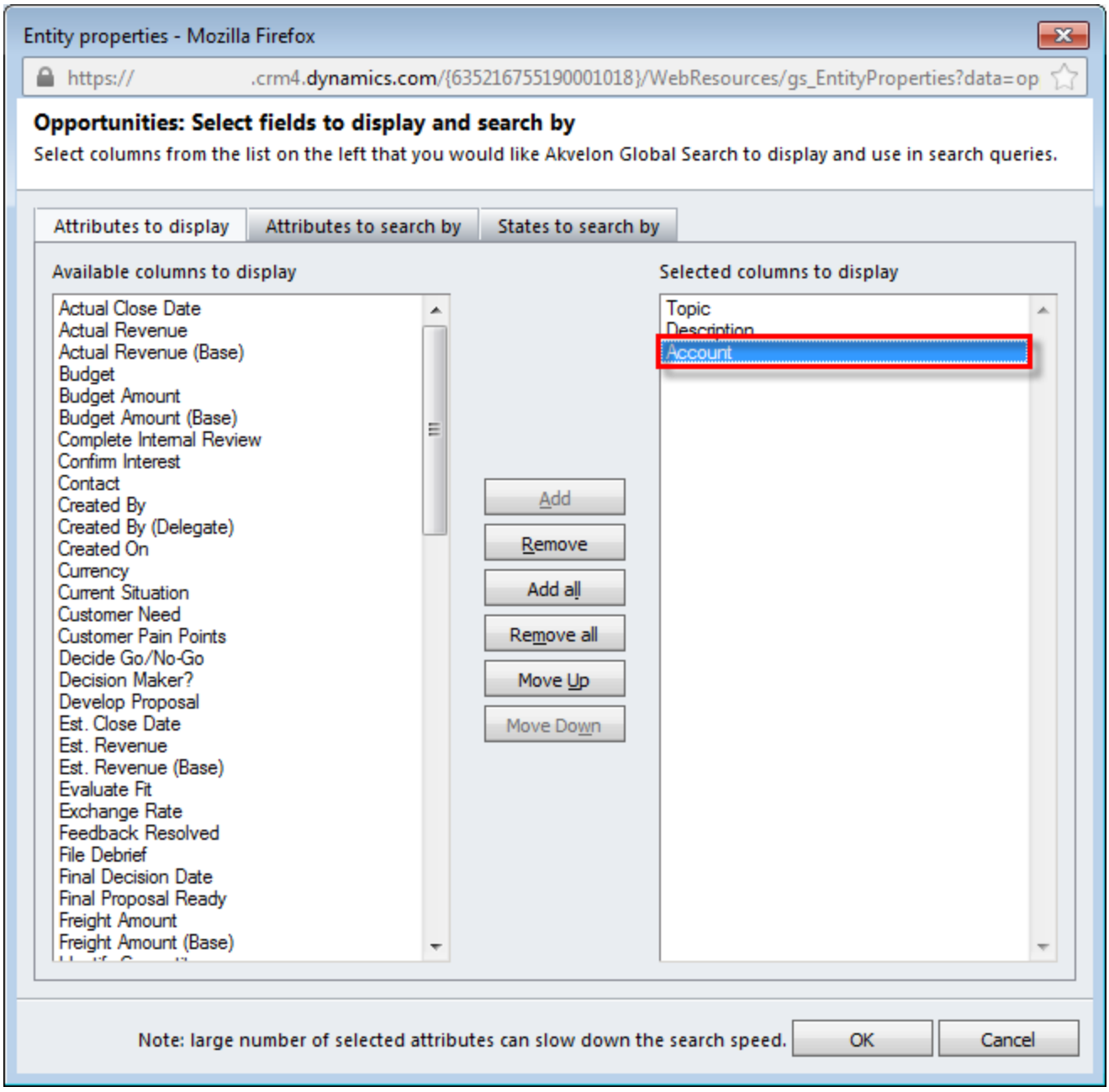

Figure 10 Search Lookup Settings

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

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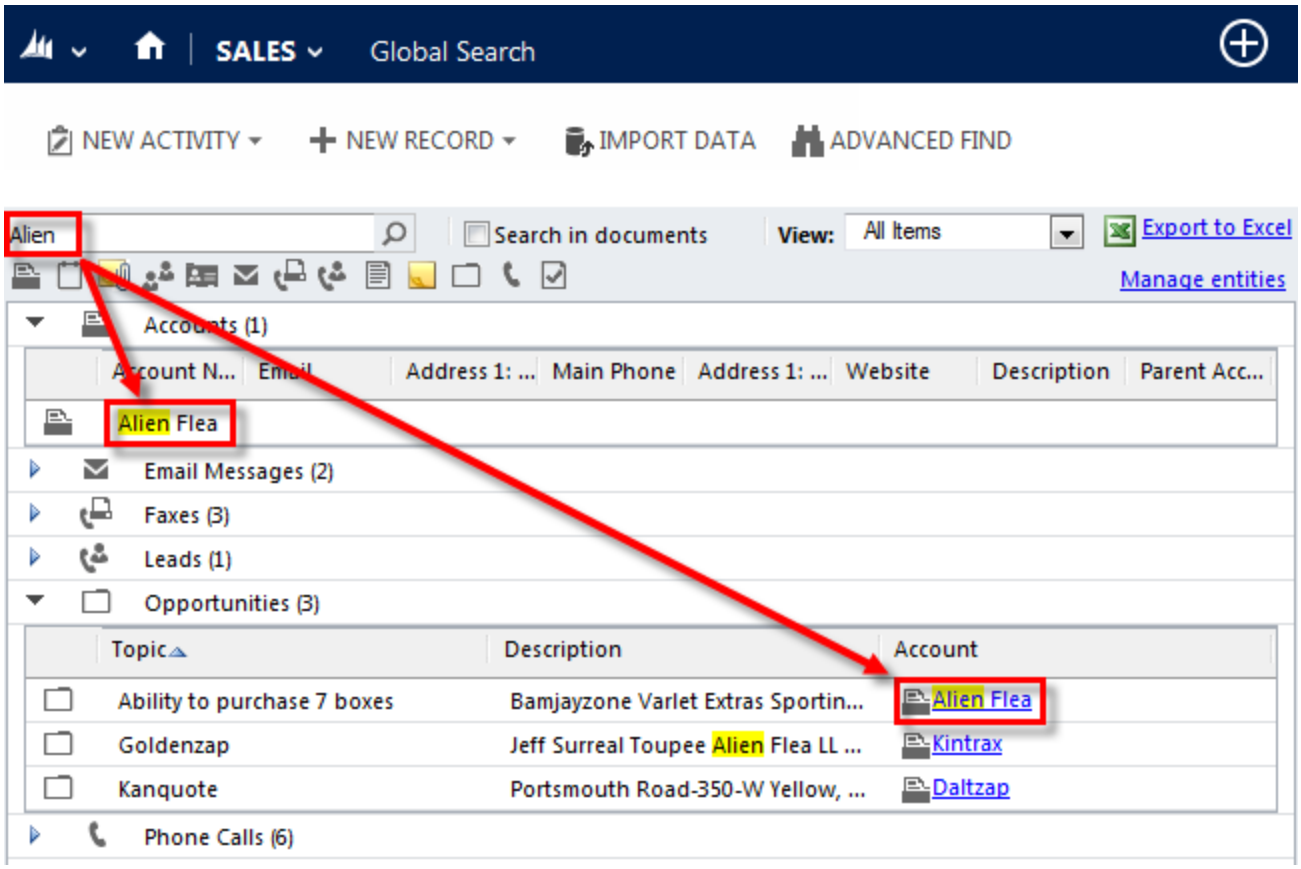

Figure 11 Search by Lookup Field

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.

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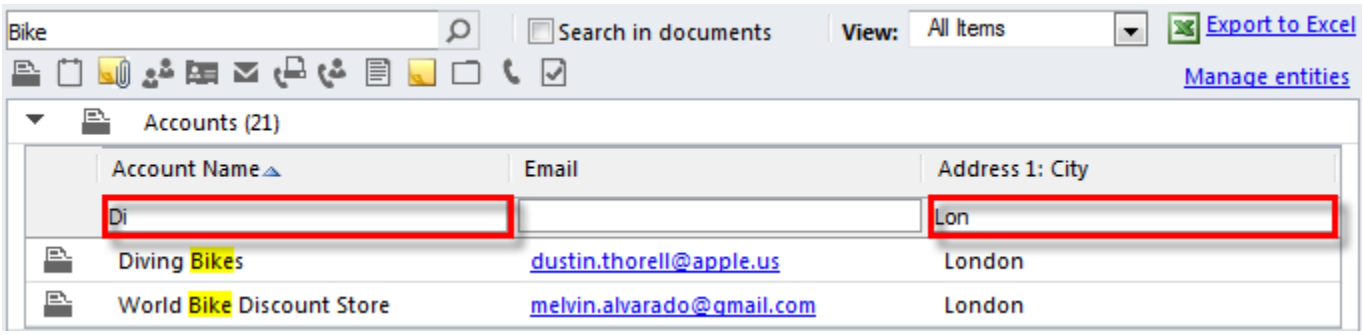

Figure 12 Inside Column Filter

Export found data to an Excel static worksheet

This feature requires 'Export to Excel' privilege that can be set on security roles (open a security role, go to the Business Management tab and look under "Miscellaneous Privileges"). By default, an exported worksheet includes found records and fields that are displayed in the search results, using the same field order and sorting.

1. In the main Global Search window, click Export to Excel (see Figure 13).
2. In the Export Data to Excel dialog box, select entity which you want to export to Excel. Please note that CRM doesn't provide ability to export multiple entities at a time.
3. Click Export button > Open or Save Excel file.

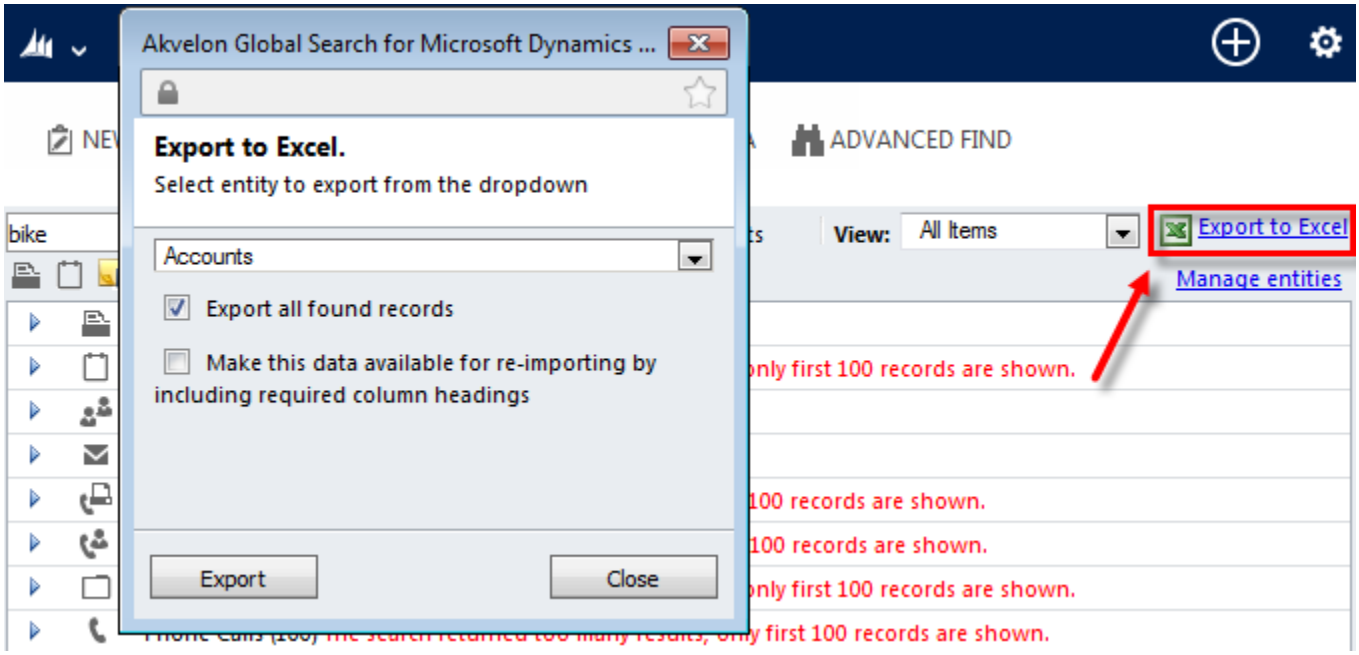

Figure 13 Export found results to Excel

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Export all found records option – provides ability to export all found records to Excel. For example, Maximum Number of Found Records = 100 (see Configuring Maximum Number of Found Records), but Global Search has found 172 accounts, this option provides ability to export all 172 records to Excel.

Make this data available for re-importing by including required column headings option - if you are exporting the data so that you can make changes and import it back into Microsoft Dynamics CRM, select this check box (file will be saved in XML format).

Notes:

- When you open Excel file - you will see a message that says the file that you are trying to open is in a different format than specified by the file extension. Click Yes.
- In Microsoft Dynamics CRM, money values are exported to Microsoft Office Excel as numbers. After you have completed the export, to format the data as currency, see the Excel Help topic titled “Display numbers as currency.”
- Maximum number of records which you can Export to Excel at a time, depends on Microsoft Dynamics CRM configuration.

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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 14). Click **OK** button.

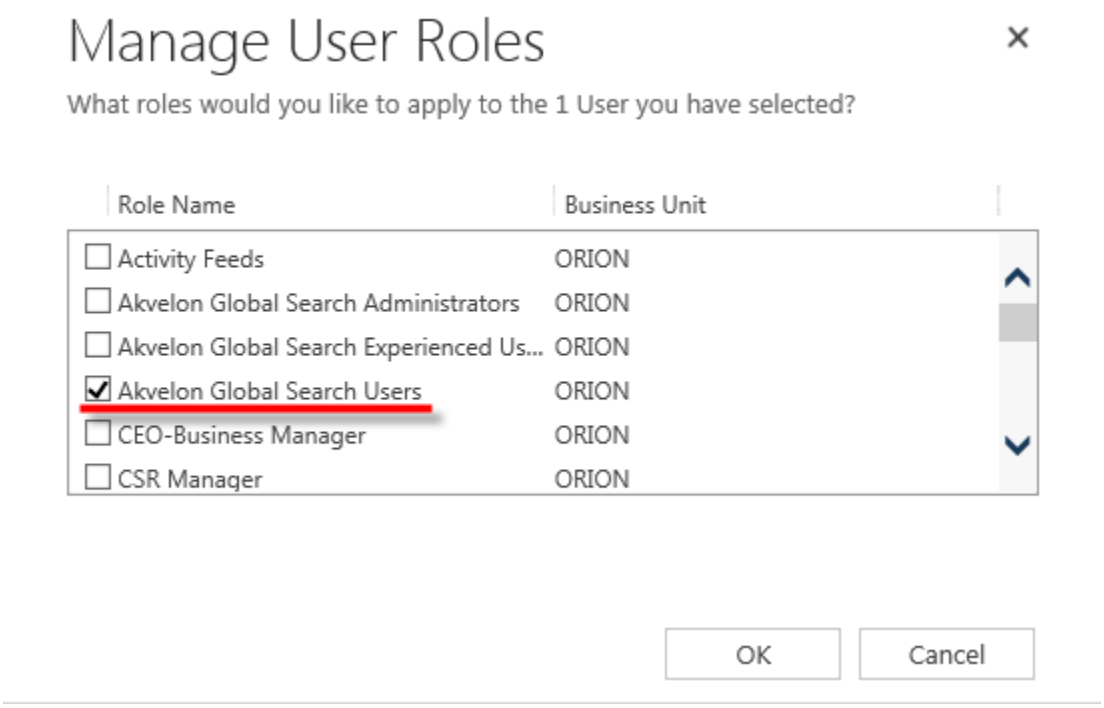

Figure 14 Global Search users permissions

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 15)

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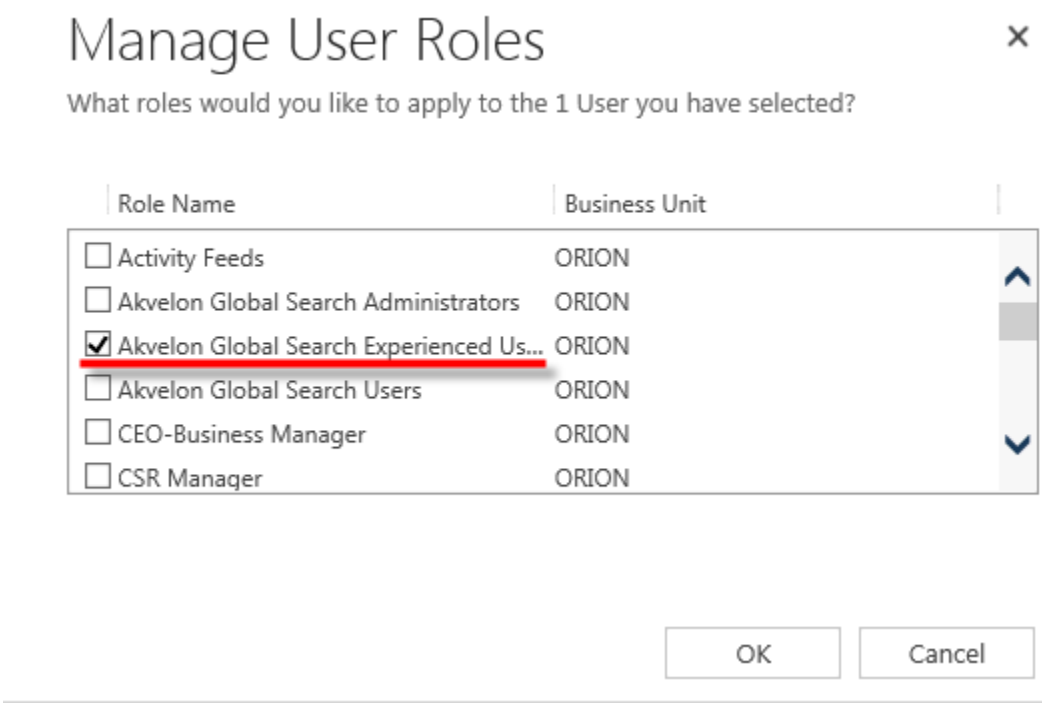

Figure 15 Manage User Roles

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).

Please note:

- **Akvelon Global Search Administrators** – doesn't influence number of Global Search licenses;
- **Akvelon Global Search Experienced Users** - influences number of Global Search licenses;
- **Akvelon Global Search Users** - influences number of Global Search licenses;
- **Akvelon Global Search role assigned to Teams** - influences number of Global Search licenses.

For example: you purchased 10 Global Search licenses, and you have **2** users with **Akvelon Global Search Administrators** role, **3** users with **Akvelon Global Search Experienced Users** role and **4** users with **Akvelon Global Search Users** role **– only 7 licenses is used in this case. 3 licenses are available for additional Global Search users.**

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If you have User-1 with Akvelon Global Search Users/Experienced Users role and User-2 without this role, but **User-2 is assigned to CRM Team which has Global Search Users/Experienced Users role** – in this case, 2 licenses will be used. Please be aware.

Adding/Removing Entities to Search

By default, Akvelon Global Search has set of configured Entities/Attributes to search through Dynamics CRM records and display search results. 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 16). You will see the list of entities that are currently enabled for search.

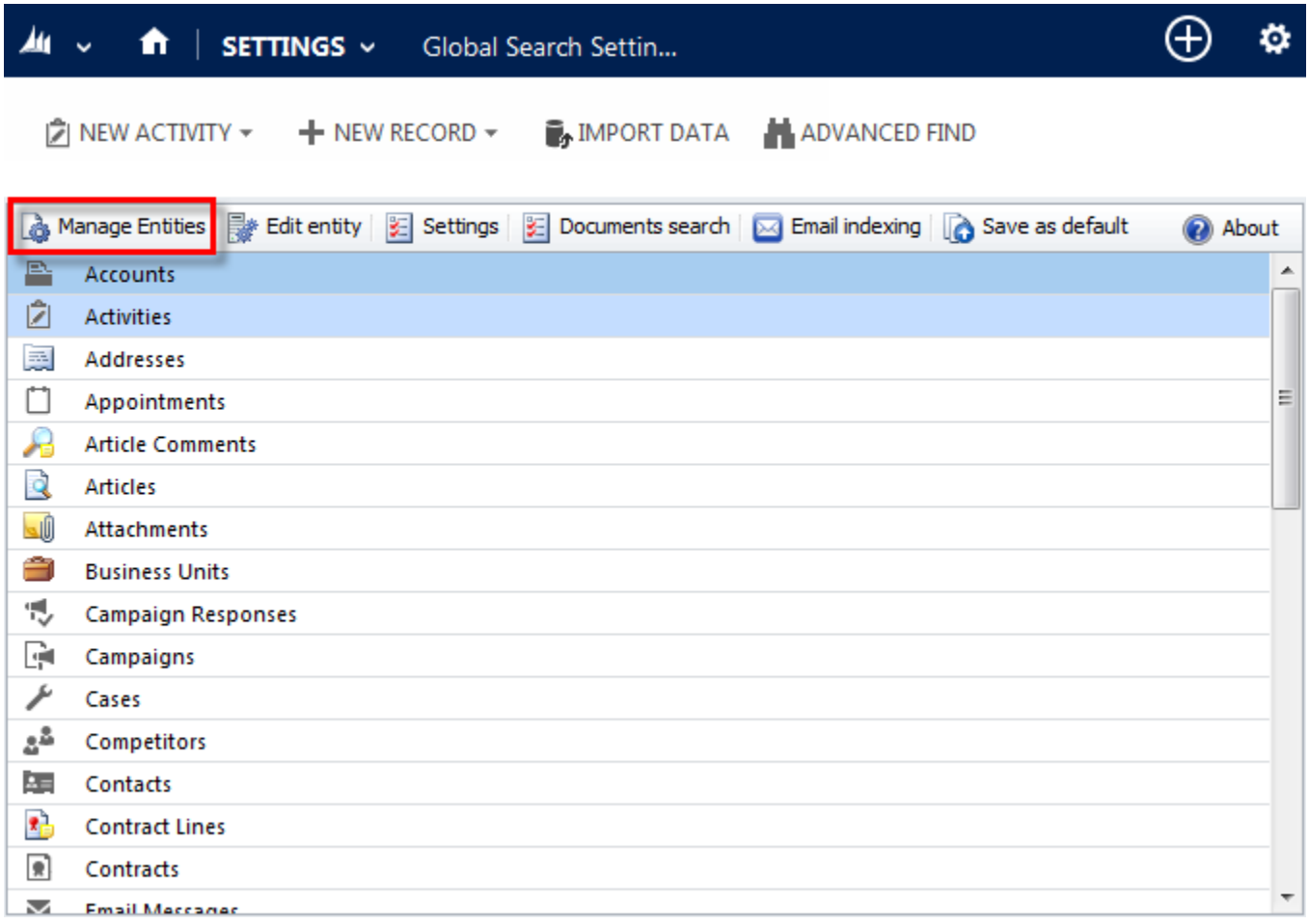

Figure 16 Global Search Settings

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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 17).

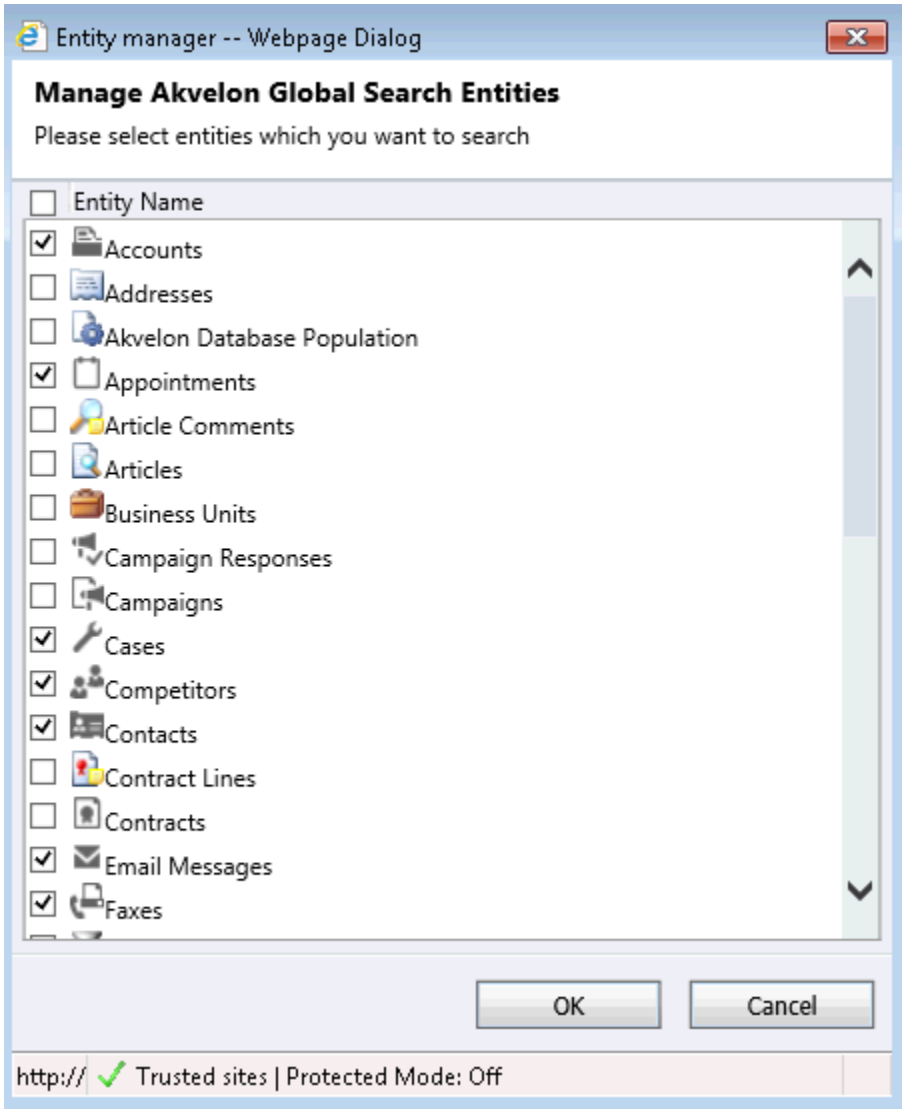

Figure 17 Manage Global Search Entities

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.

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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 18), 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.

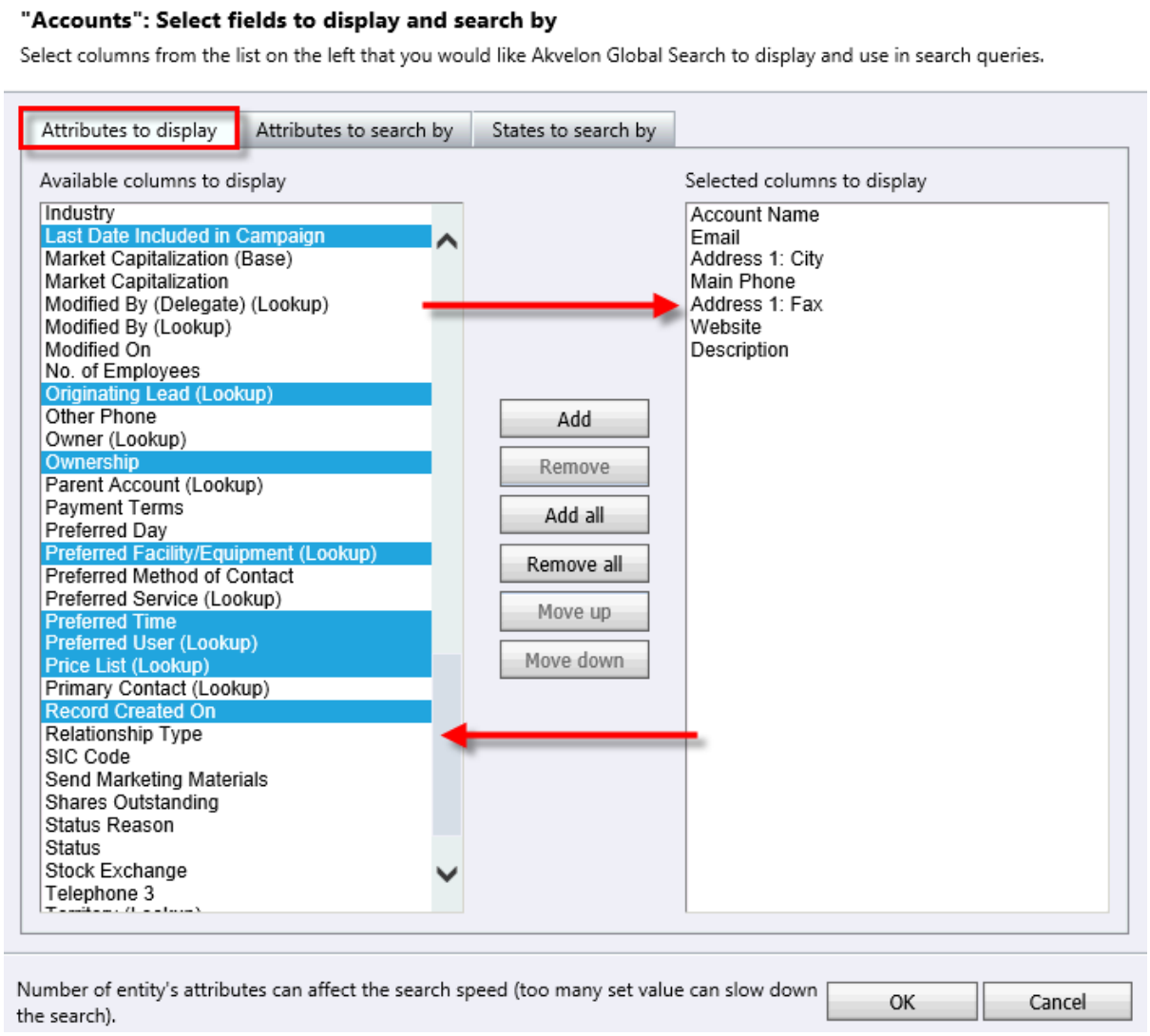

Figure 18 Attributes to display window

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

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On the **Attributes to Search by** tab (see Figure 19), select the entity attributes that will be used in search queries.

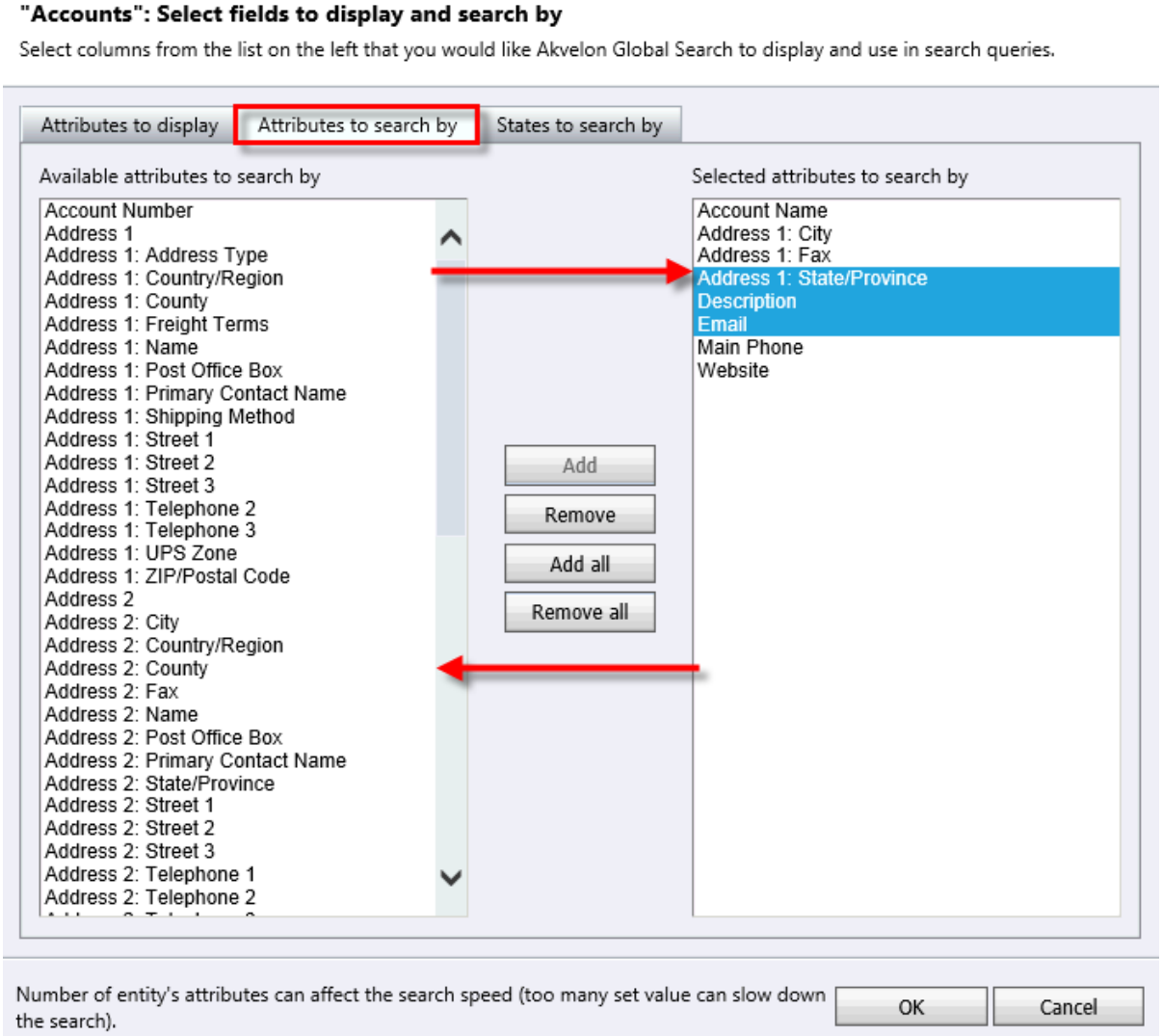

Figure 19 Attributes to search

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.

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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 20).

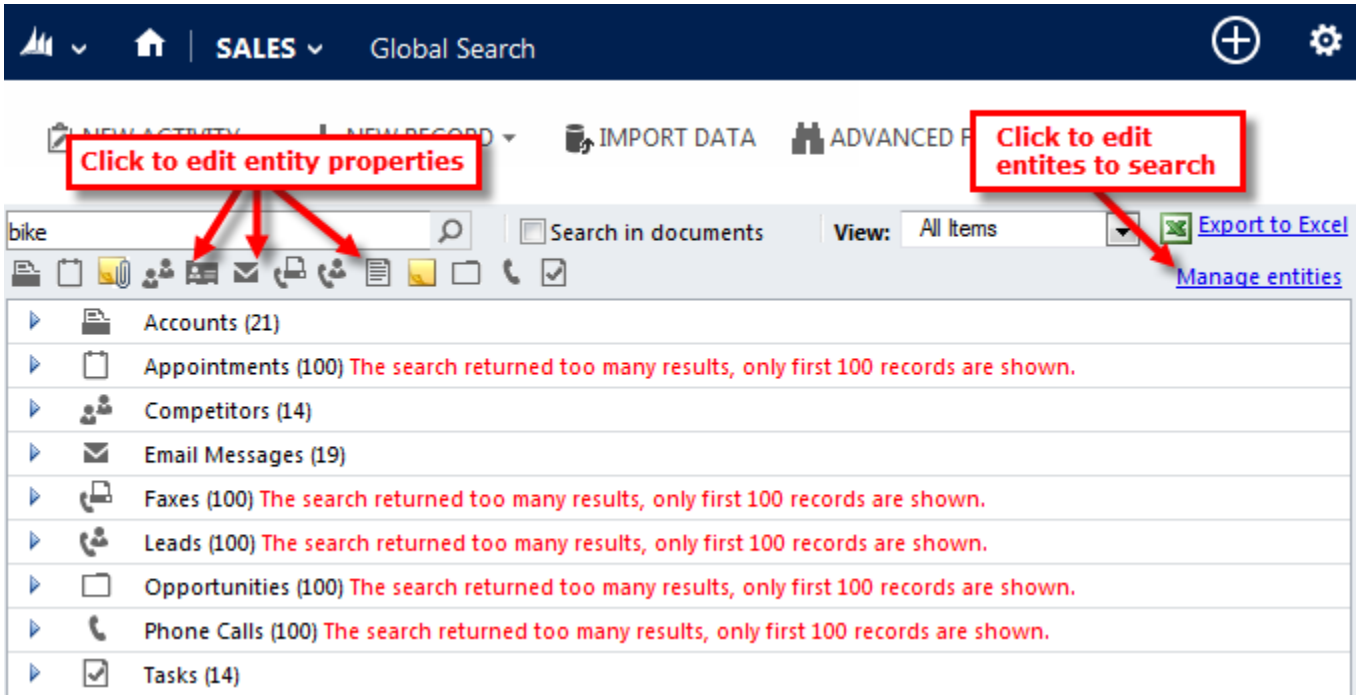

Figure 20 Quick search settings panel

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) - go to the **Settings > Global Search Settings** page and click on **Settings**. You can change this value to any number from 10 to 500 records (see Figure 21).To apply new settings, click Ok button. Please note that large values can affect searching performance.

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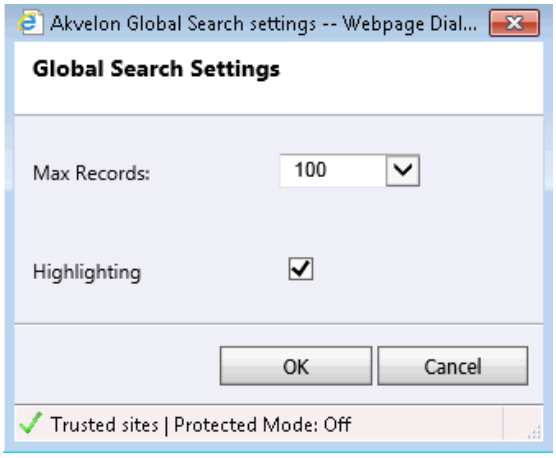

Figure 21 Configuring Maximum Number of Found Records

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

Note: Large values can slow down search performance.

Enable/Disable Highlighting Keywords

Highlighting keywords provides ability to quickly find used keyword in search results (see Figure 22). To Enable/Disable highlighting keywords, go to the **Global Search Settings** page, click on **Settings,** tick the **"Highlighting"** option and click the OK button (see Figure 23).

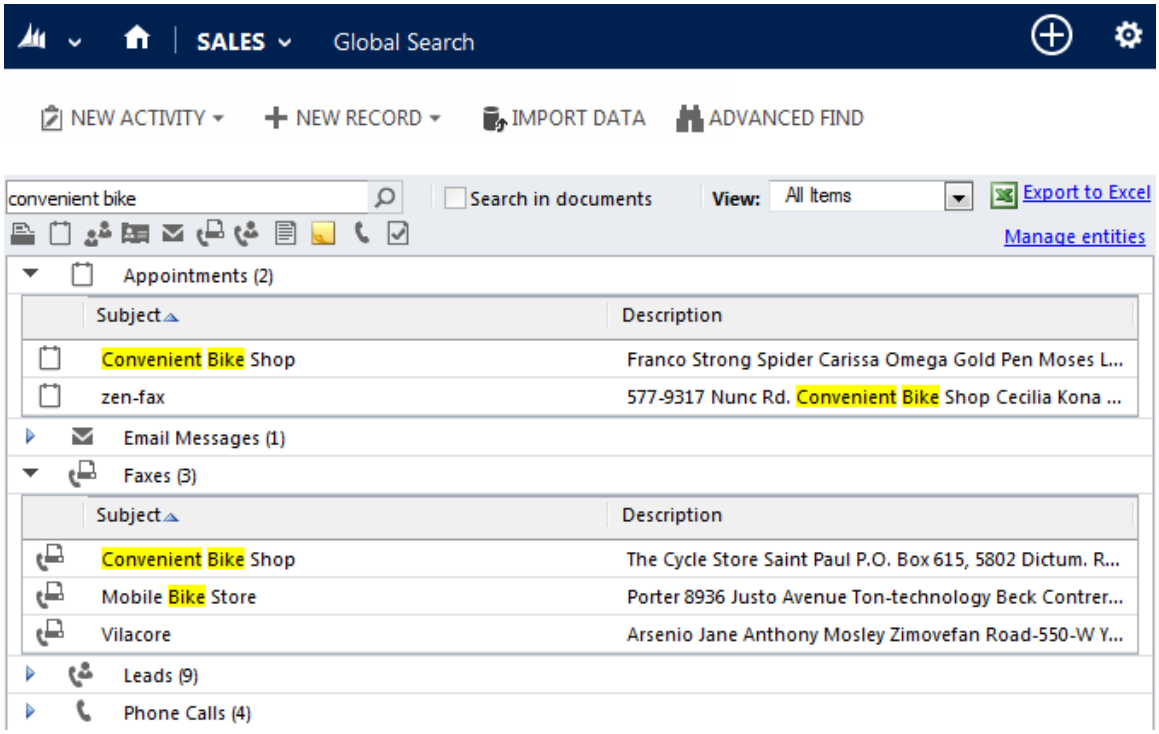

Figure 22 Highlighting Keywords

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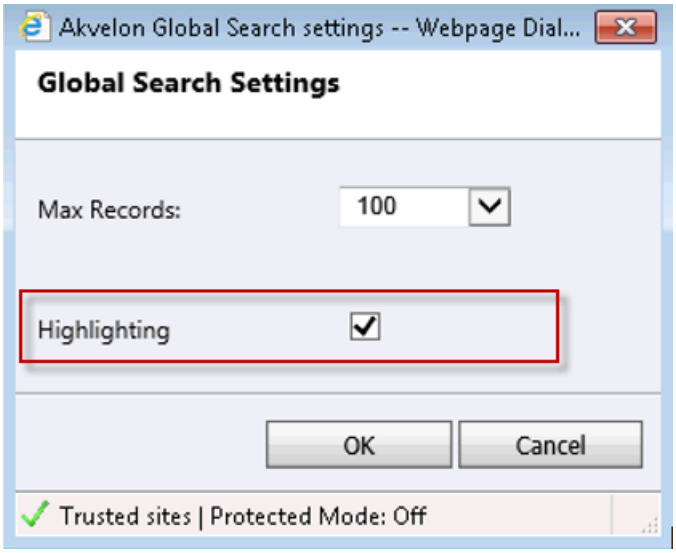

Figure 23 Highlighting option

Auto-expand Entities in Search Results

This new feature provides ability to automatically open group of entities in the search if only one record was found in this group (see Figure 24).

This feature is disabled by default. To enable this feature, go to the **Global Search Settings** page and click on **Settings**. Select the **"Auto-expand group if 1 record is found"** and click Ok button (see Figure 25).

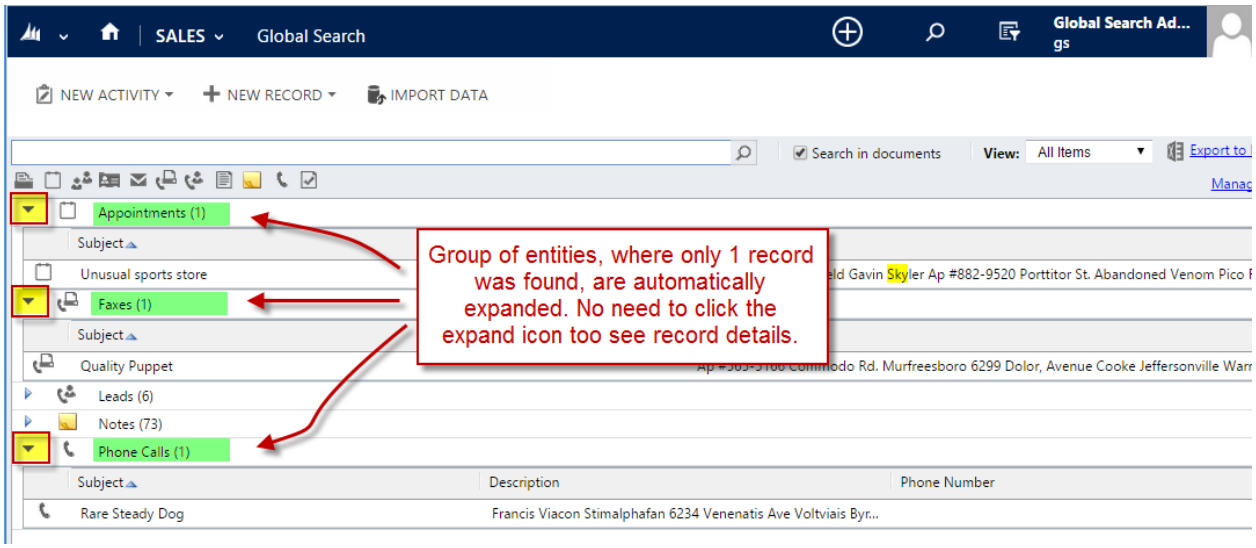

Figure 24 Auto-expand Entities in Search Results

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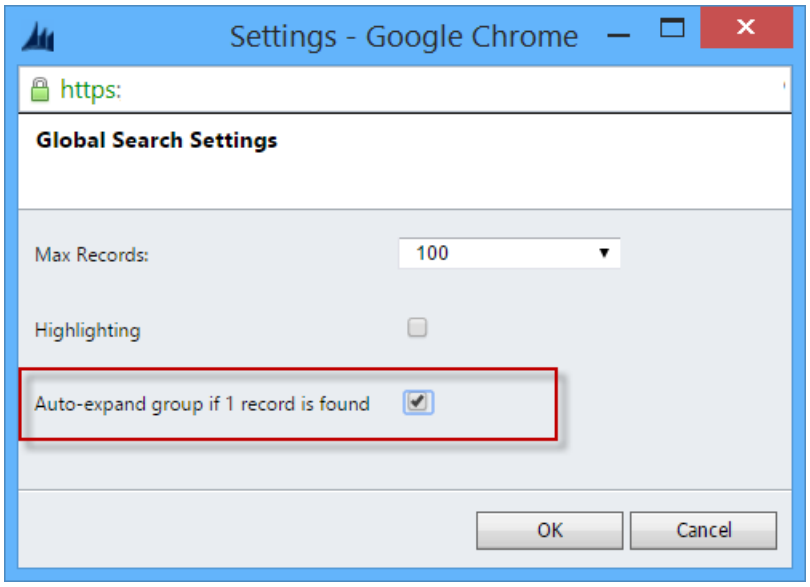

Figure 25 Auto-expand option in the Settings screen

Display Relationships for Notes and Attachments in Search Results

This feature provides ability to display entity's details, which is related to found attachment or note. For example, Global Search found CRM attachment related to the Contact. If user expands Notes, then Contact, combination of Attachment's and Contact's attributes will display in the search results (see Figure 26).

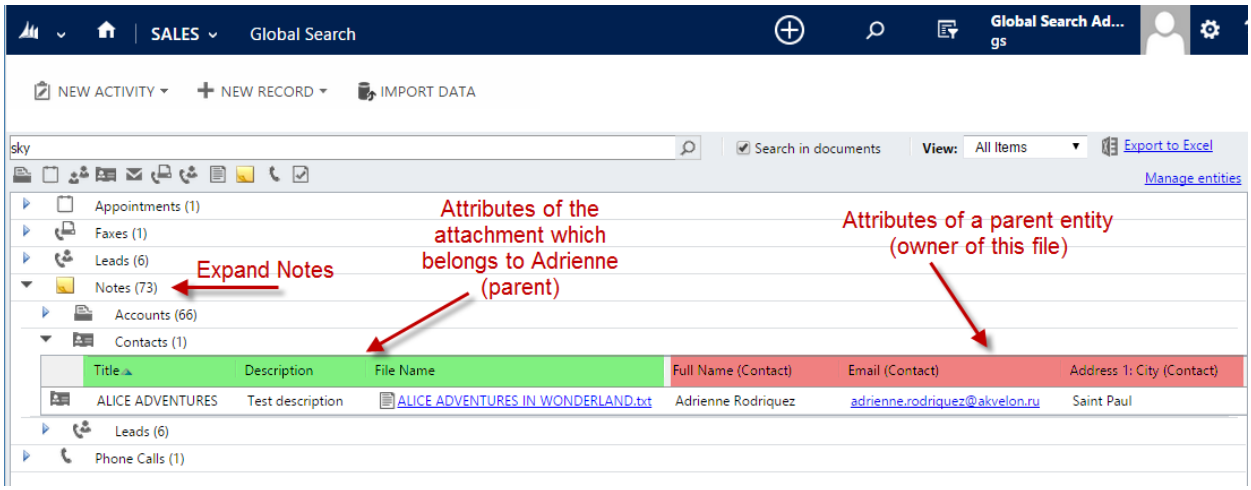

Figure 26 Display Relationships for Attachments in Search Results

Attributes to display for Attachments and Notes automatically inherit from a parent entity (Attributes to display columns, see Configuring Entity Properties section).

This feature is enabled by default. There is no option to disable it via UI in the current version of the application. Please contact gs.support@akvelon.com if you need to disable this feature.

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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 27).

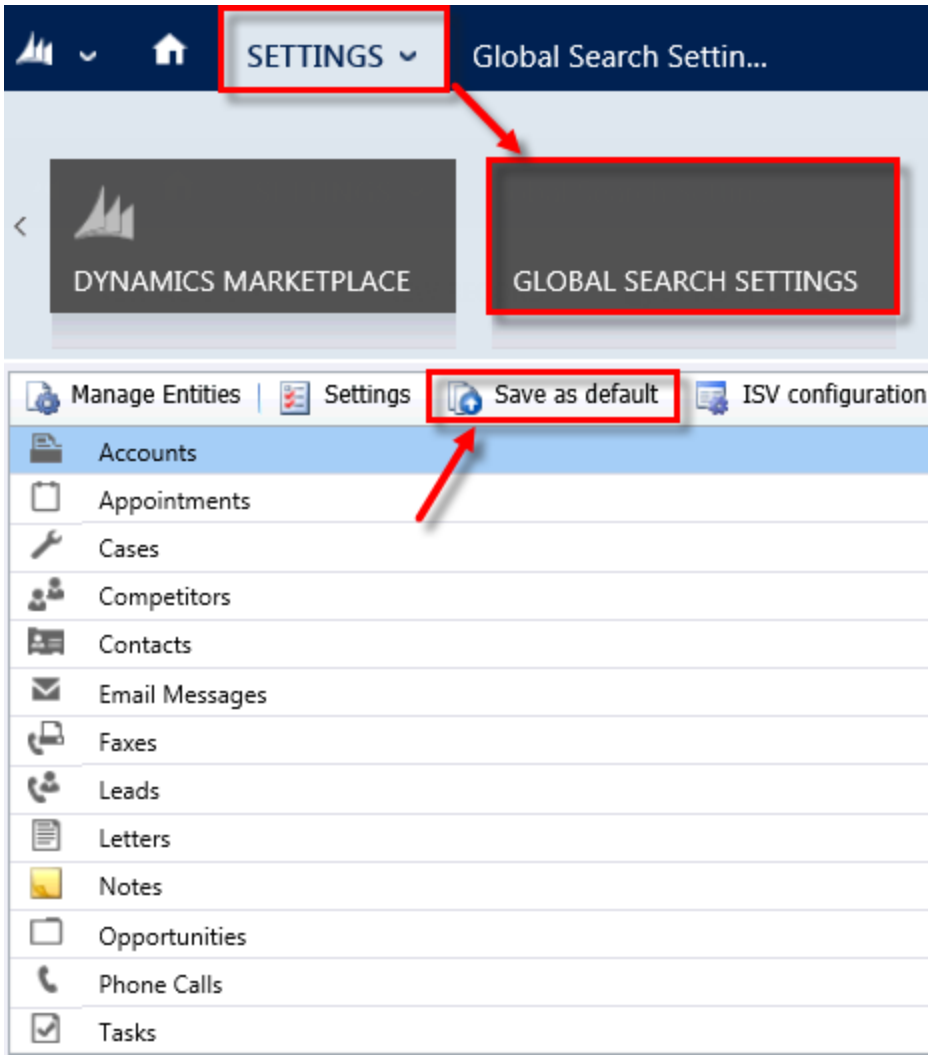

Figure 27 Save as Default button

Select **"Users with the following roles: …"** and click **OK** to apply settings for all users: **Akvelon Global Search Online Users, Akvelon Global Search Online Experienced Users** and **Akvelon Global Search Online Administrators** (see Global Search Users Permissions section for more details).

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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 28).

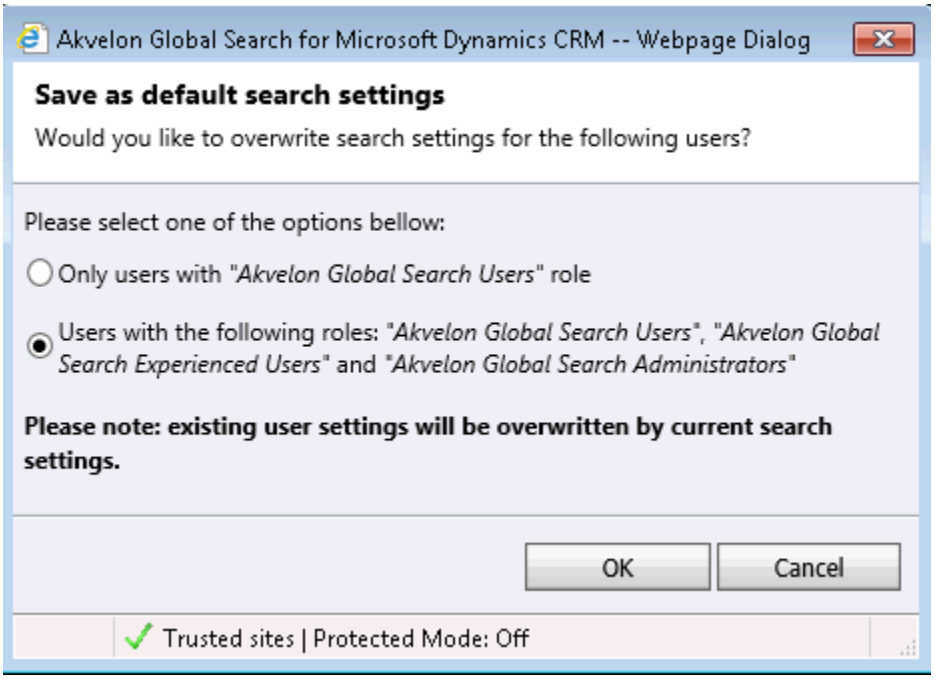

Figure 28 Select user roles to apply settings

Configuring Attachment Search

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

Go to **CRM Settings** -> **Global Search Settings**. Make sure **Notes** and **Attachments** is added to Global Search Setting then click the **Document Search** button (please see Figure 29)

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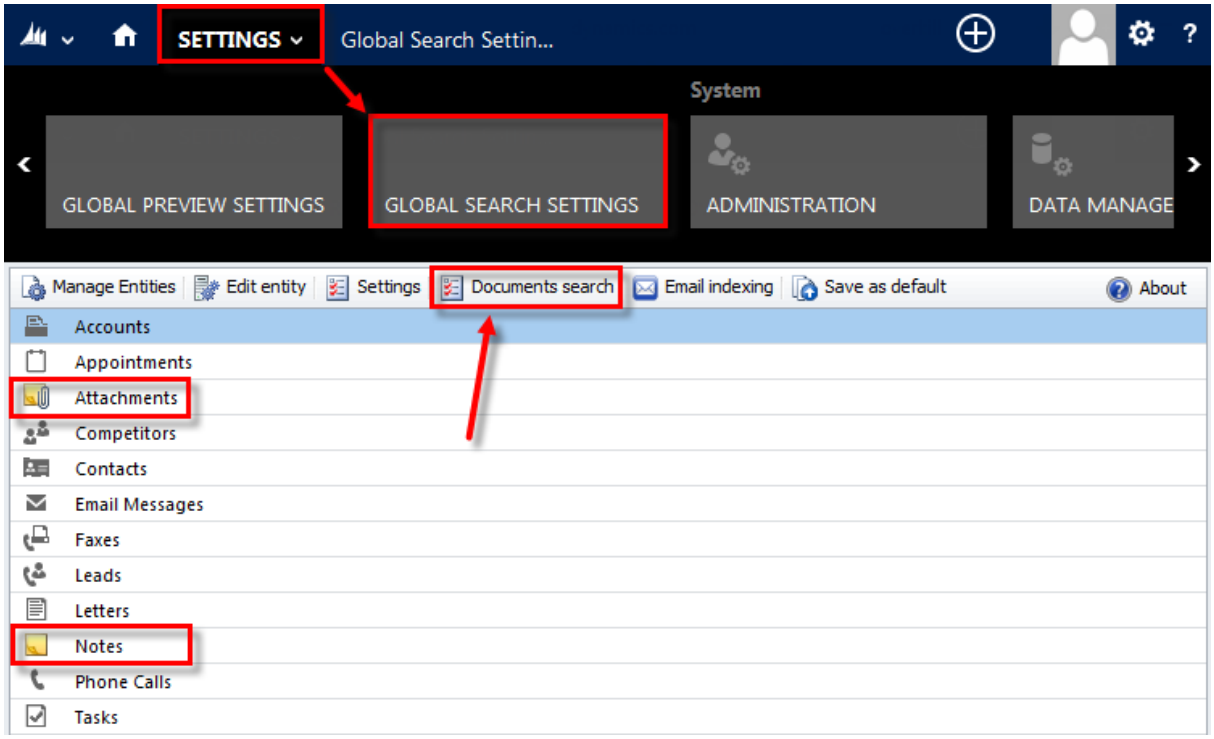

Figure 29 Documents search button

Documents Search Configuration will open (see Figure 30)

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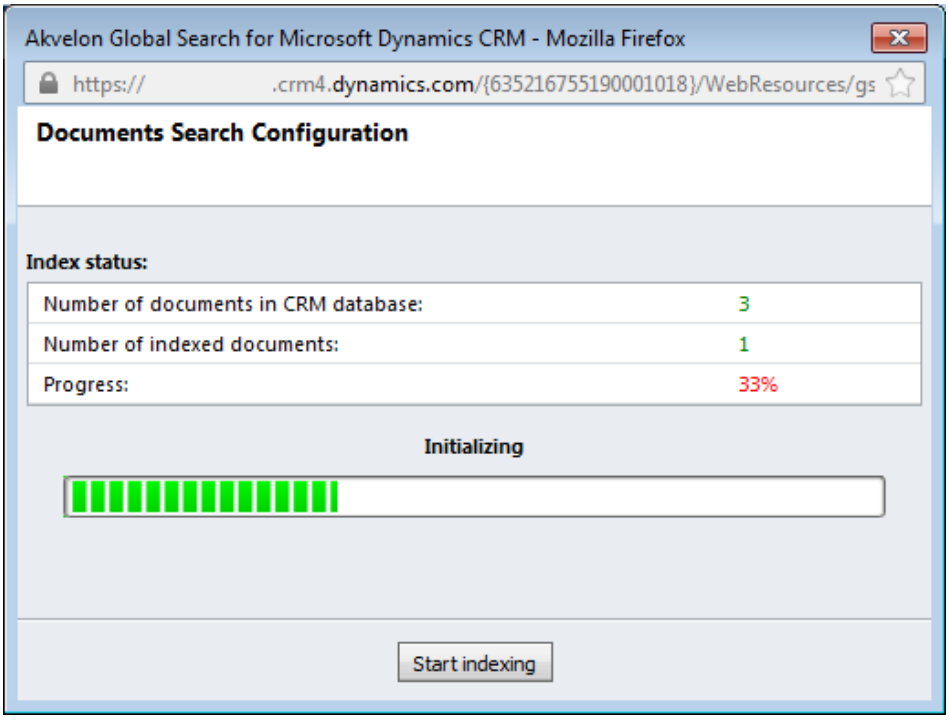

Figure 30 Document Search Configuration window

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 31).

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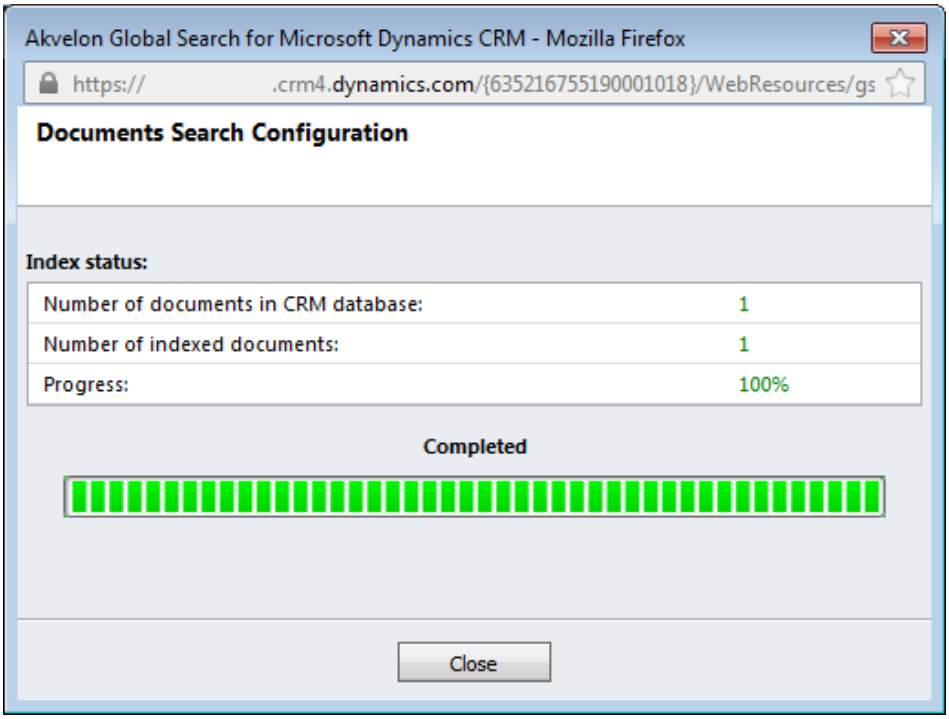

Figure 31 Documents Indexing Progress Status

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%-

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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 32).

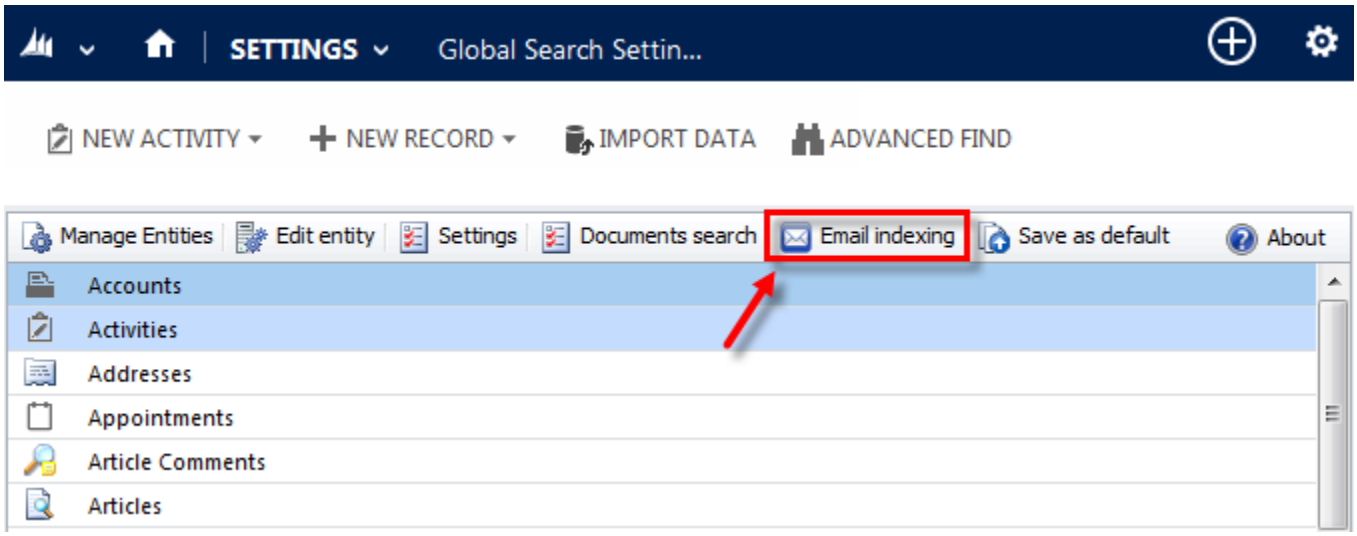

Figure 32 Email Indexing button

E-mail Indexing configuration window will be open (see Figure 33). 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 34).

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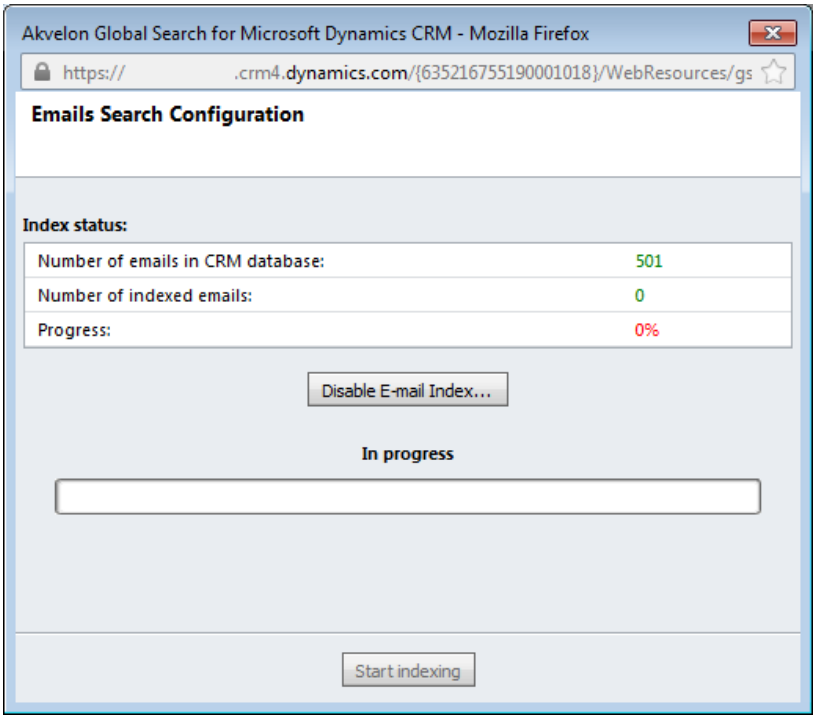

Figure 33 Email Indexing Initializing

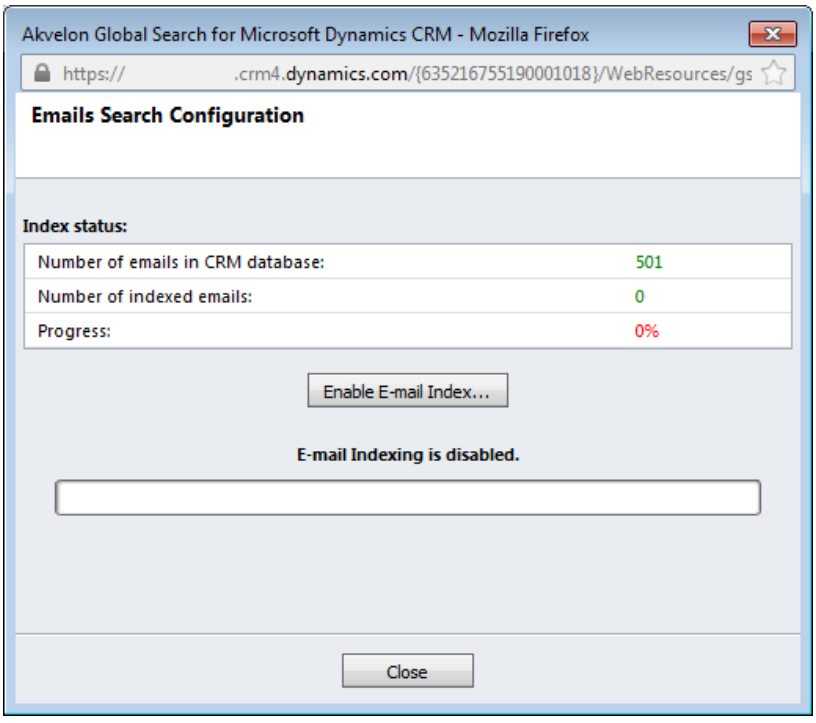

Figure 34 Email Indexing status

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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 35).

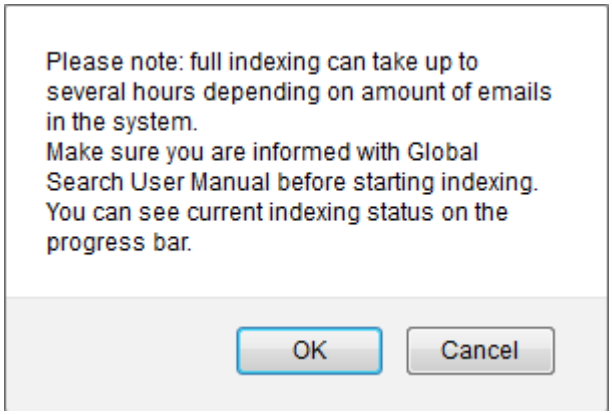

Figure 35 Confirm dialog

You can see the current indexing status in the Email indexing window (see Figure 36). 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.

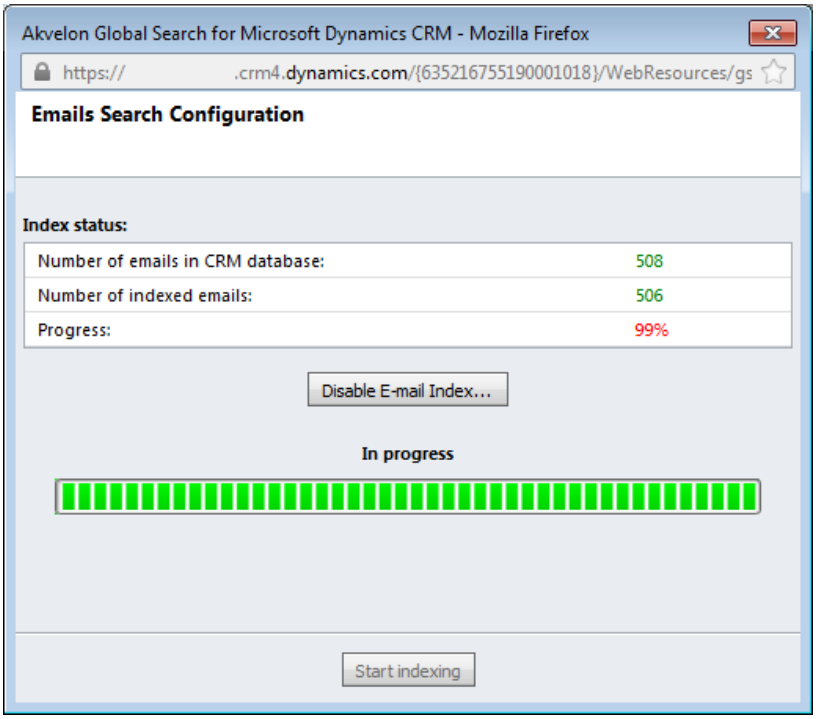

Figure 36 Email indexing progress status

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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 37).

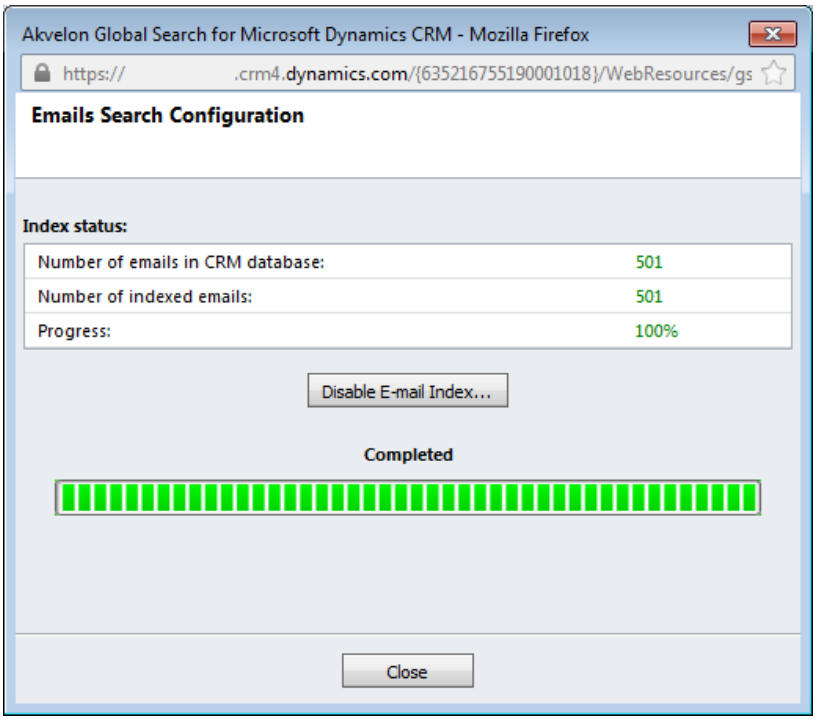

Figure 37 Email Indexing completed

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 section).

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).

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Feedback

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

The Akvelon team encourages and appreciates leaving feedback about Akvelon Global Search at the CRM Dynamics Marketplace site.

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