



Search for Dynamics v1.4.3.1

Installation Guide

SharePoint 2013 and 2016

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Chapter 1: Prerequisites

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

- SharePoint Server 2013 or 2016 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 Components

Install Permissive XFrame Header SharePoint Solution

By default, web browsers allow you to display pages in an iFrame, but only from the domain of main page. However, Dynamics CRM and SharePoint Server can be located in different domains. To avoid this issue, a SharePoint solution must be deployed and enabled on the SharePoint server. This operation explicitly enables pages to display in any iFrames.

1. Download the Permissive XFrame Header SharePoint solution from: <http://ventigrate.codeplex.com/releases/view/79825>
2. Unzip the PermissiveXFrameHeader DEPLOY.zip file. This operation displays three (3) folders. Each folder contains the `Ventigrate.Shared.PermissiveXFrameHeader.wsp` for either 2013 or 2016.
3. SharePoint Management Shell: To start, right-click and run as administrator.
4. Use the `Add-SPSolution` PowerShell command to add the downloaded wsp package (for the SharePoint version that you are running) to the SharePoint farm. (For more information, see [Add-SPsolution on technet.microsoft.com](http://technet.microsoft.com).)

```

Administrator: SharePoint 2016 Management Shell
PS C:\Users\svc_sharepoint> Add-SPSolution -LiteralPath "C:\BAINSLIGHT\Dynamics\2016\Ventigrate.Shared.PermissiveXFrameHeader.wsp"
Name                SolutionId           Deployed
----                -
ventigrate.shared.p... af9484b8-49e9-48e5-8749-87fdfee1647f False
PS C:\Users\svc_sharepoint> _

```

5. Go to **Central Admin > System Settings > Farm Management > Manage farm solutions**. Select `Ventigrate.Shared.PermissiveXFrameHeader.wsp` and click **Deploy solution**.
6. (When asked to deploy the solution) **Now** and **OK**: Select.

Name	Status	Deployed To
ventigrate.shared.permissivexframeheader.wsp	Deployed	Globally deployed.

7. Go to **Central Admin > Application Management > Web Applications > Manage web applications** and select the web application of your search center site.
8. (In the ribbon) **Manage Features**: Click and activate the `Permissive X-FRAME-OPTIONS Header` feature and click **OK**.

Install Templates and Pages

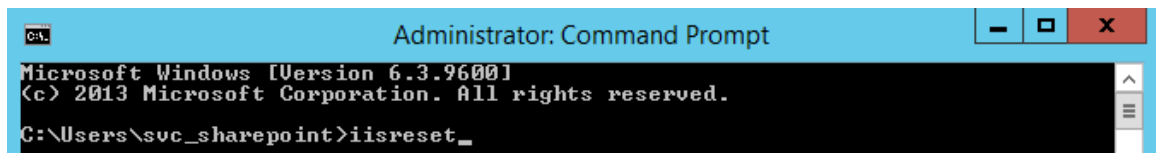
The search results page of the search center is displayed inside Dynamics, and supports Dynamics specific actions. For this reason, you must customize the pages and templates.

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. On the SharePoint server, open Windows Explorer and navigate to `C:\inetpub\wwwroot\wss\VirtualDirectories\80` (80 is the port number of your SharePoint Web Application, so this number could be different). Right click the `web.config` and make a copy of your `web.config` file and edit the original file.
5. Paste the following line into the `web.config` under `<SafeControls>`:

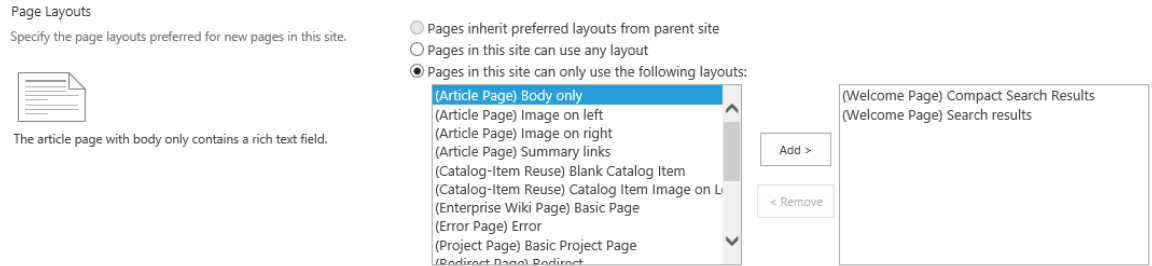

```
<SafeControl Assembly="Microsoft.Office.Server.Search,
Version=16.0.0.0, Culture=neutral,
PublicKeyToken=71e9bce111e9429c"
Namespace="Microsoft.Office.Server.Search.Internal.UI"
TypeName="*" Safe="True" AllowRemoteDesigner="True"/>
```

<SafeControls>
<SafeControl Assembly="System.Web, Version=4.0.0.0, Culture=neutral, PublicKeyToken=b03f5f7f11d50a3a" Namespace="System.Web.UI.k
<SafeControl Assembly="System.Web, Version=4.0.0.0, Culture=neutral, PublicKeyToken=b03f5f7f11d50a3a" Namespace="System.Web.UI.h
<SafeControl Assembly="System.Web, Version=4.0.0.0, Culture=neutral, PublicKeyToken=b03f5f7f11d50a3a" Namespace="System.Web.UI"

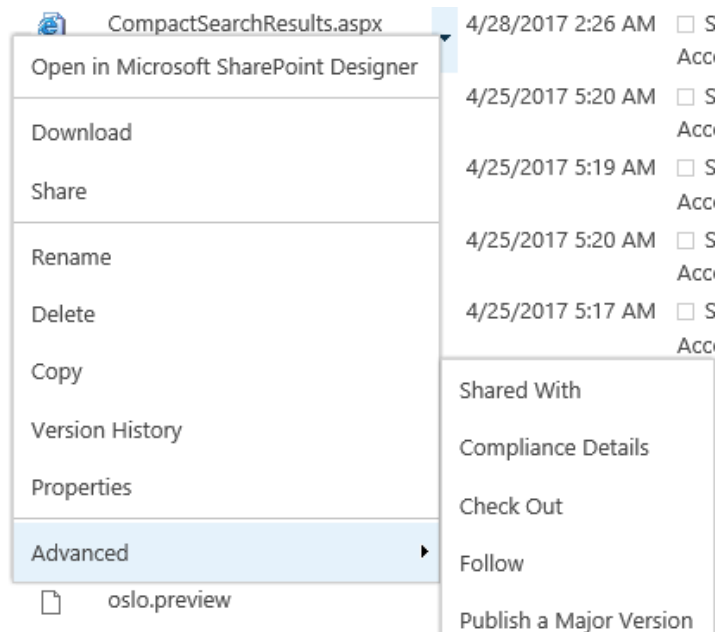
For more information, see [Add your Web Part to your Safe Controls list](#).
6. Perform an IIS Reset by opening a Command Prompt window as administrator. Type `iisreset` and press **Enter**.



7. Back in SharePoint, on 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**.

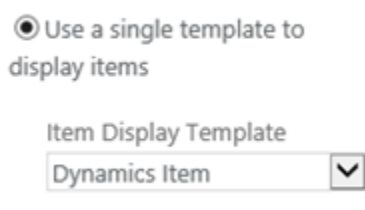


8. Gear icon: Click and select **Site contents > Pages**. Scroll to **results** (or to the selection that you named in the search results page). From **File** in the ribbon, select **Download a copy**. Save the file as a new name for example `compactresults.aspx`.
9. (On the ribbon) **Files**: Select 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.)
10. Gear icon: Click and select **Site contents > Master pages and page layouts**. Find `CompactSearchResults.aspx`, click on the page and from the drop-down under **Advanced**, select **Publish a major version**.



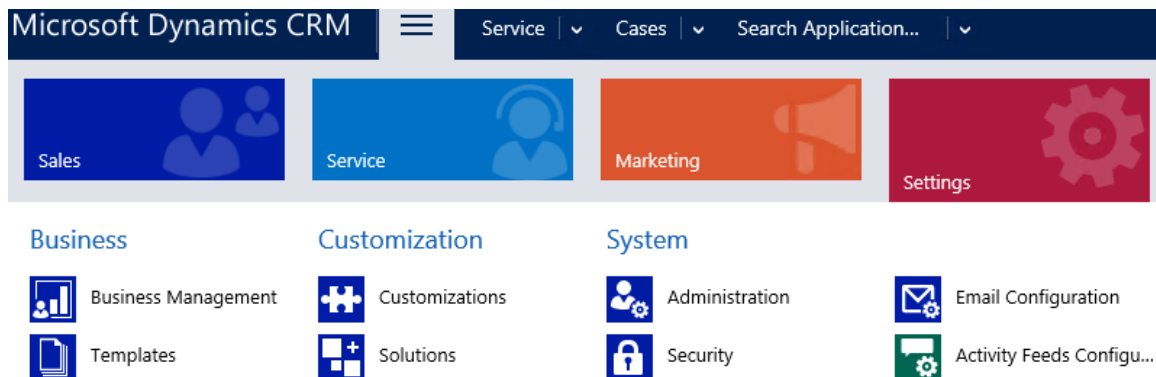
11. Go back to the Pages library (by clicking the gear icon and selecting **Site Contents**) Click to open the page you saved earlier for example `Compactresults`. Click on the gear icon, and select **Edit page**.
12. On the ribbon select **Page > Page Layout**, and select `Compact search results`.
13. 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**.

14. 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.
15. 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**.

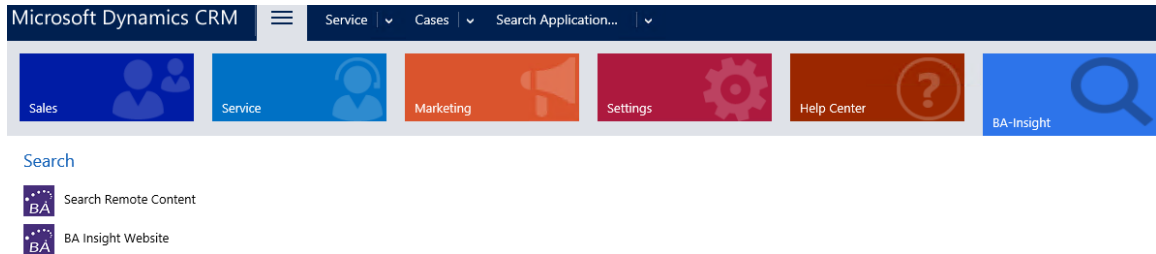


3. **Import:** Click and upload the BAI Dynamics Add-on zip file.
4. Click on the name of the imported package, and select Configuration in the tree on the left side.
5. Go to the **General** section and set both URLs to the location of your new file. For example, compactresults.aspx. On the SharePoint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

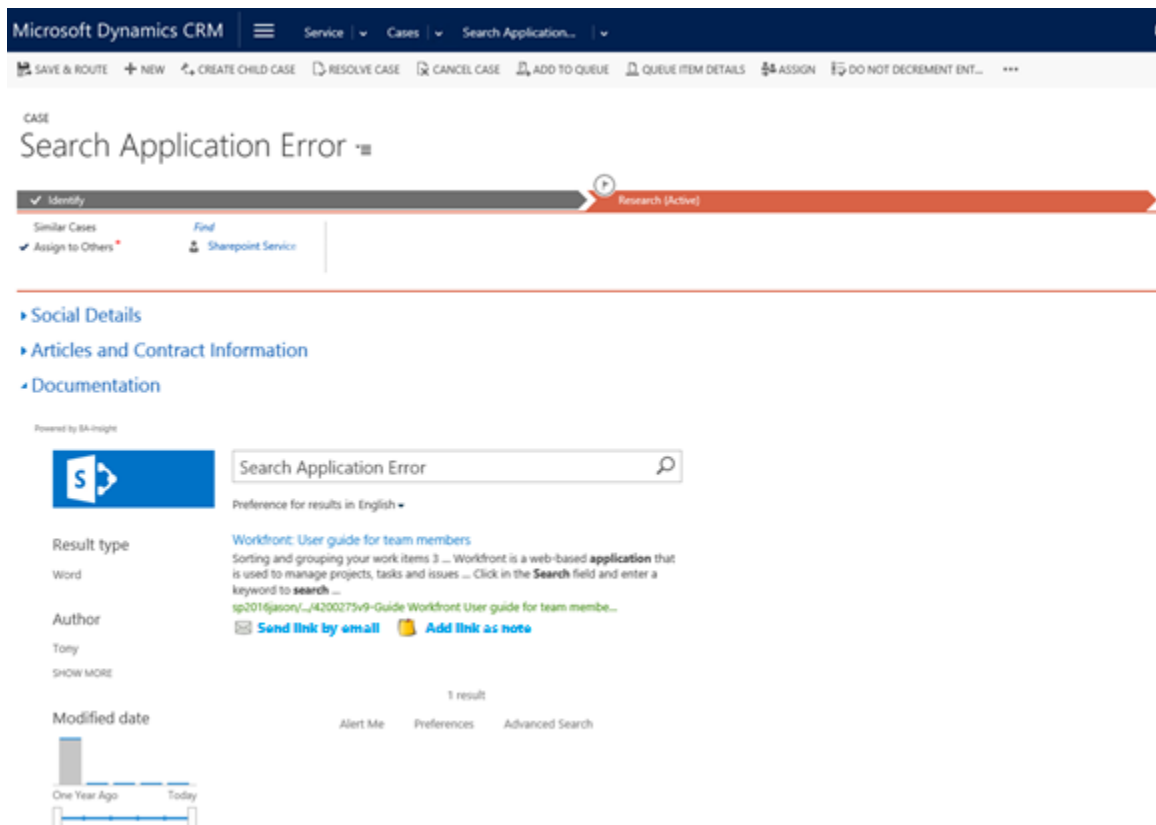


Chapter 3: Use Search for Dynamics

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