

InterAction® Search Tools for Microsoft® Internet Explorer®

Introduction

Microsoft Internet Explorer 7 and later include support for custom search providers. Search Providers enable searches of specific sources to be carried out immediately through a dedicated search field at the top right of the browser window.

Internet Explorer 8 and later also include support for search accelerators. Accelerators enable custom searches to be carried out via the right-click menu after selecting some text on any page.

Microsoft and other suppliers make available search providers & accelerators for a wide range of specific sources such as Google, Bing, Amazon and Wikipedia.

At a technical level, search providers and accelerators simply consist of single small XML files. Providers can be installed locally by the user after visiting a specific installation web page, or managed centrally by an administrator. No executable code is involved.

What are the InterAction Search Tools for Internet Explorer?

The InterAction Search Tools comprise a search provider and a search accelerator for InterAction that allows a search for a name, phone or email address to be made in InterAction directly from any web page, without requiring the user to visit the InterAction web client first to perform the search.

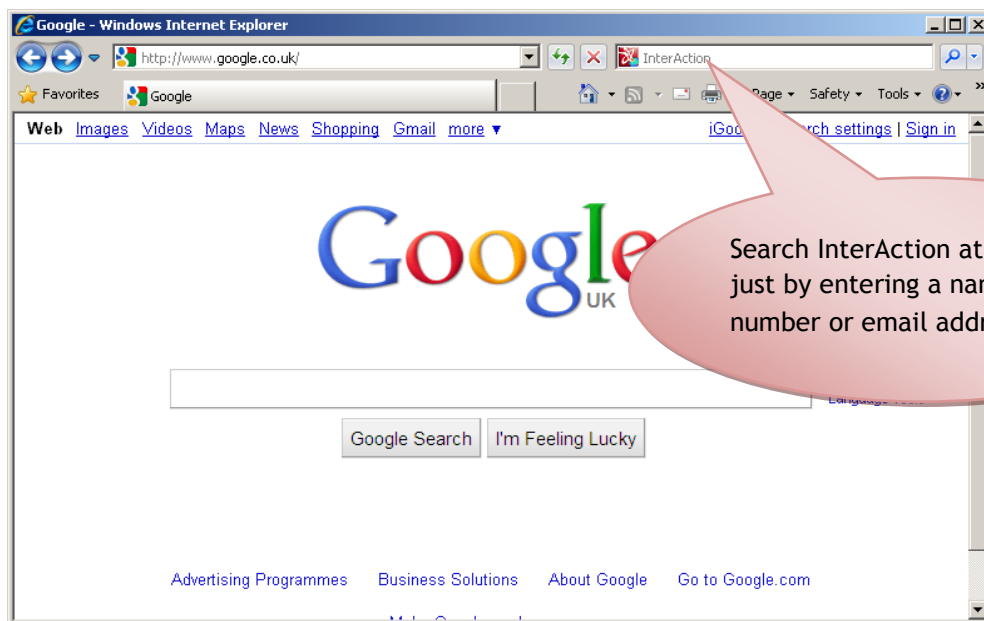
Fellsoft provide a free utility which creates the required search provider and accelerator XML files, and a web page that end-users can visit to install the provider and/or accelerator.

What are the benefits?

The InterAction Search Tools for Internet Explorer makes information from InterAction more accessible to your users by giving them immediate access to it whenever they are browsing the web. They can easily make the transition from seeing a contact name, phone or email on a web page to viewing all the information held about that contact in InterAction.

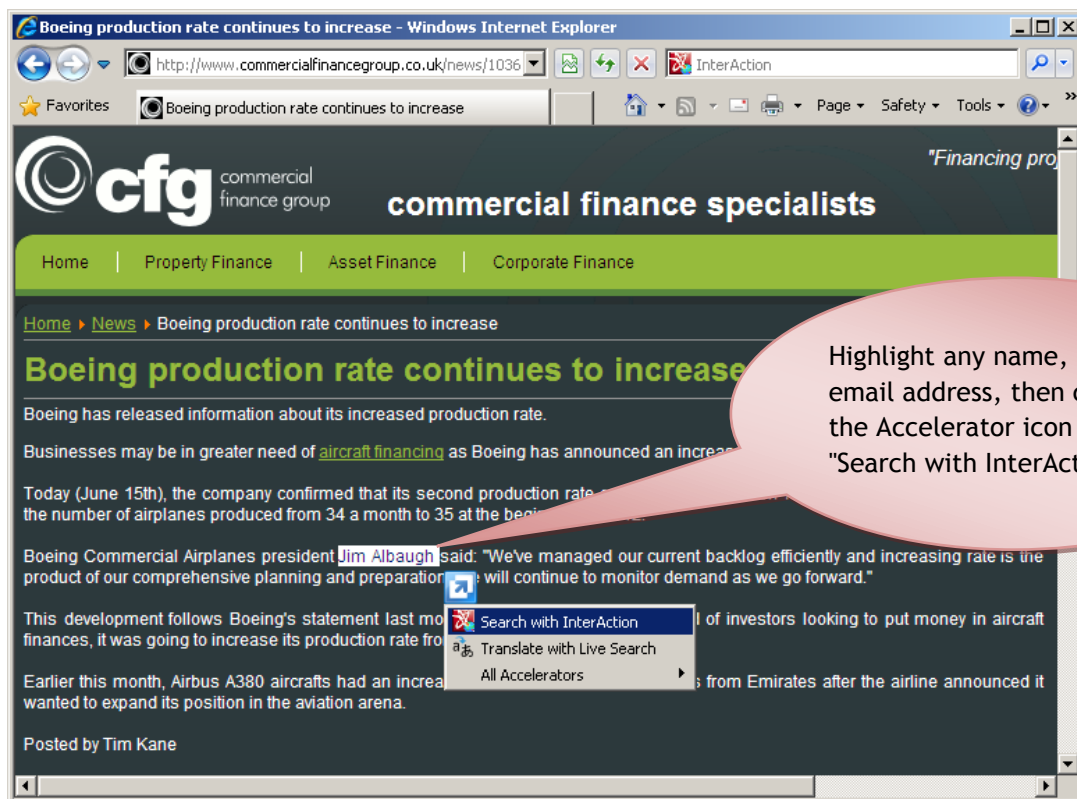
How does it work in Internet Explorer 7?

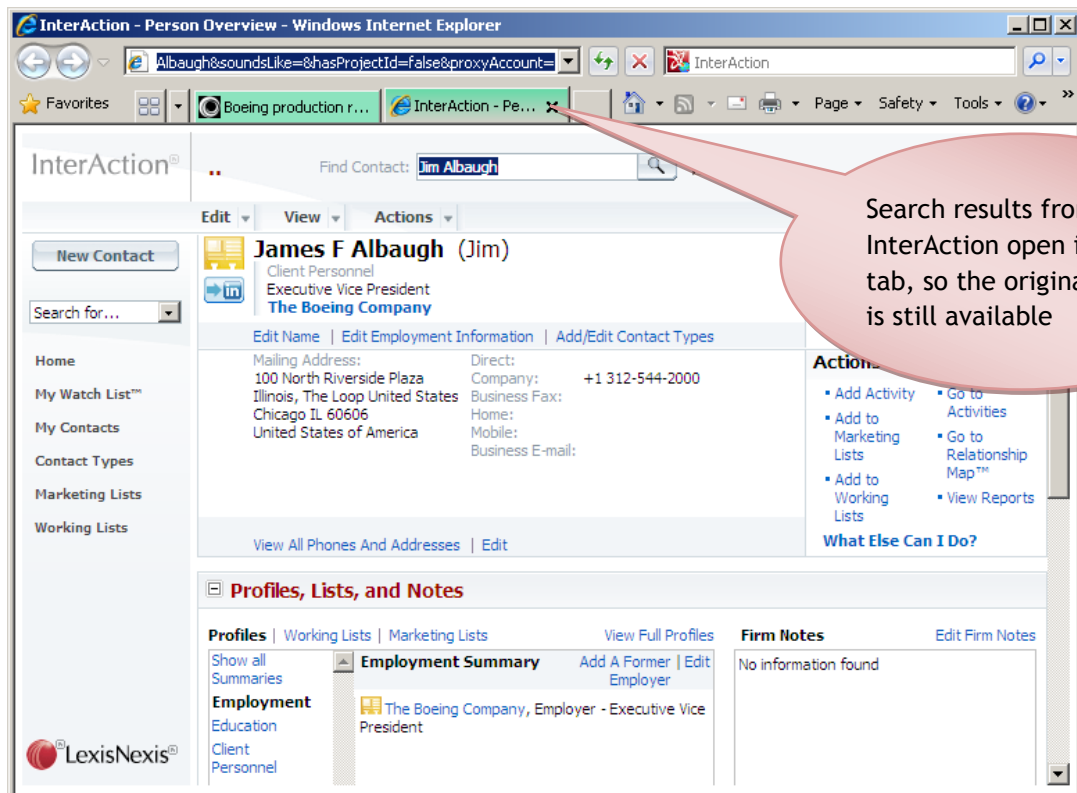
In Internet Explorer v7, the InterAction Search Provider can be accessed through the search field at the top of the browser window, as shown below:



How does it work in Internet Explorer 8?

In Internet Explorer v8, the InterAction Search Accelerator can be accessed by simply highlighting a name, phone number or email address on any web page, as shown below:





Search results from InterAction open in a new tab, so the original page is still available

Can a user have more than one search provider?

Yes. If multiple search providers are configured, one of them will be used by default. The others will be available simply by clicking in the search box and picking the required search provider from the list of those available.

What are the system requirements?

You must be running InterAction v5.5 or later, and Microsoft Internet Explorer v7 or later.

Your InterAction environment must be configured so that no separate login is required when users access the InterAction web client ("pass-through" or NTLM authentication).

How can I give users access to the InterAction Search Provider?

Fellsoft provide a free utility program to create the files required for a user to add the InterAction Search Tools to their Internet Explorer environment.

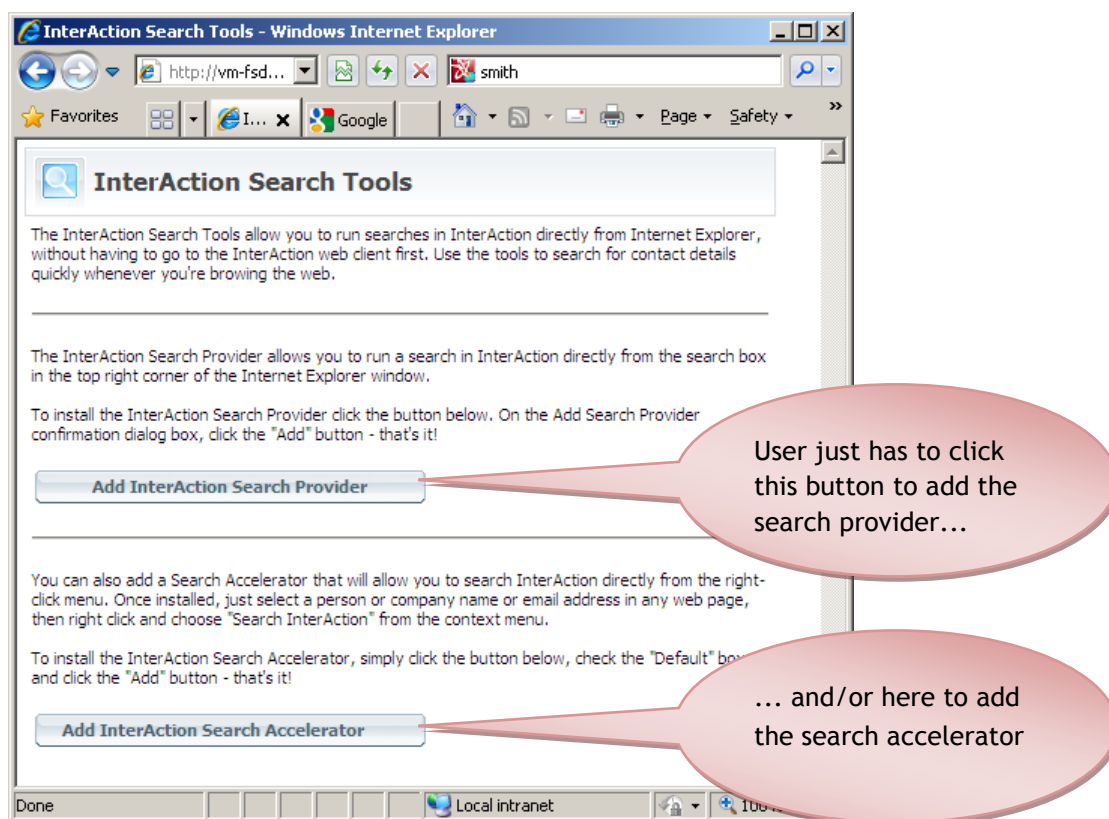
This utility is available on request at no charge by email request to support@fellsoft.com.

You can run the utility on any machine, but the process is a little simpler if you run it on the InterAction Application Server itself. To use it follow the steps below.

1. Run the InterAction Search Provider creation utility, and provide your InterAction web server name and your InterAction version (v5.5 and later are supported).
2. The utility will generate three small files. One file - AddSP.html - is a simple web page (screenshot below) that enables any user to add the provider to their browser when they visit the page. The other two files - InterActionSearchProvider.xml and InterActionSearchAccelerator.xml - are the XML definition files for the provider and the accelerator.

If you run the utility on the Application Server machine itself the files will automatically be created in the correct location. Otherwise, the files need to be copied to the home directory of the InterAction web client on the Application Server so that users can access them.

3. Once the files are in place, direct your users to visit the Add Search Tools page hosted on the InterAction web server and click the "Add InterAction Search Provider" and "Add InterAction Search Accelerators" buttons on the page as shown below:



Note: If you are running Internet Explorer 7, the option to install the provider will not be available as this requires Internet Explorer 8 or later.

Fellsoft Limited was founded by Simon Ellison-Bunce in October 2009 and is focused on providing add-ons and integration products for LexisNexis® InterAction®, the leading CRM software solution for relationship-based organisations and professional services firms. Visit our web site at <http://www.fellsoft.com> for more information about our InterAction products and services, and follow us on Twitter @fellsoft.