

Microsoft Dynamics CRM SiteMap Editor User's Guide

The Microsoft Dynamics CRM SiteMap Editor provides a quick and easy way for end users to update the sitemap through a user interface within Microsoft Dynamics CRM.

[Purpose](#)

[Installation](#)

[Uninstalling the SiteMap Editor](#)

[Using the SiteMap Editor](#)

[Before Updating the SiteMap](#)

[Accessing the SiteMap Editor](#)

[Adding Elements](#)

[Removing Elements](#)

[Updating Titles or Descriptions](#)

Purpose

Editing the sitemap has always been a tedious task for the end user. To be able to gain access to the sitemap xml file, one has to add the sitemap component to a solution which will then be exported, edited, and reimported back again. Sitemap configuration issues, if there are, will not be immediately seen during editing, but will only be known after publishing the updated sitemap. To mitigate these issues, and to make sitemap editing easier, this tool was built and is packaged as a solution, so it can be accessible within Microsoft Dynamics CRM.

Installation

1. After downloading the cab file from the marketplace, import it into CRM by going to **Settings** -> **Solutions** and click on the **Import** button and go through the wizard.
2. Verify that it was installed by checking the list of solutions.

Uninstalling the SiteMap Editor

1. Go to **Settings** -> **Solutions**, select the **Microsoft Dynamics CRM SiteMap Editor** solution, and click on **Delete**. Wait for the solution to complete deletion.
2. Refresh the solutions sub-grid to verify that the solution was deleted.

Using the SiteMap Editor

The intent of this document is not to give an overview on the sitemap, but on how to use the tool. It is assumed that by using this tool, the user already has some background on how to edit a sitemap. For an overview of the SiteMap and its elements, see [SiteMap XML Reference](#).

IMPORTANT! Before Updating the SiteMap

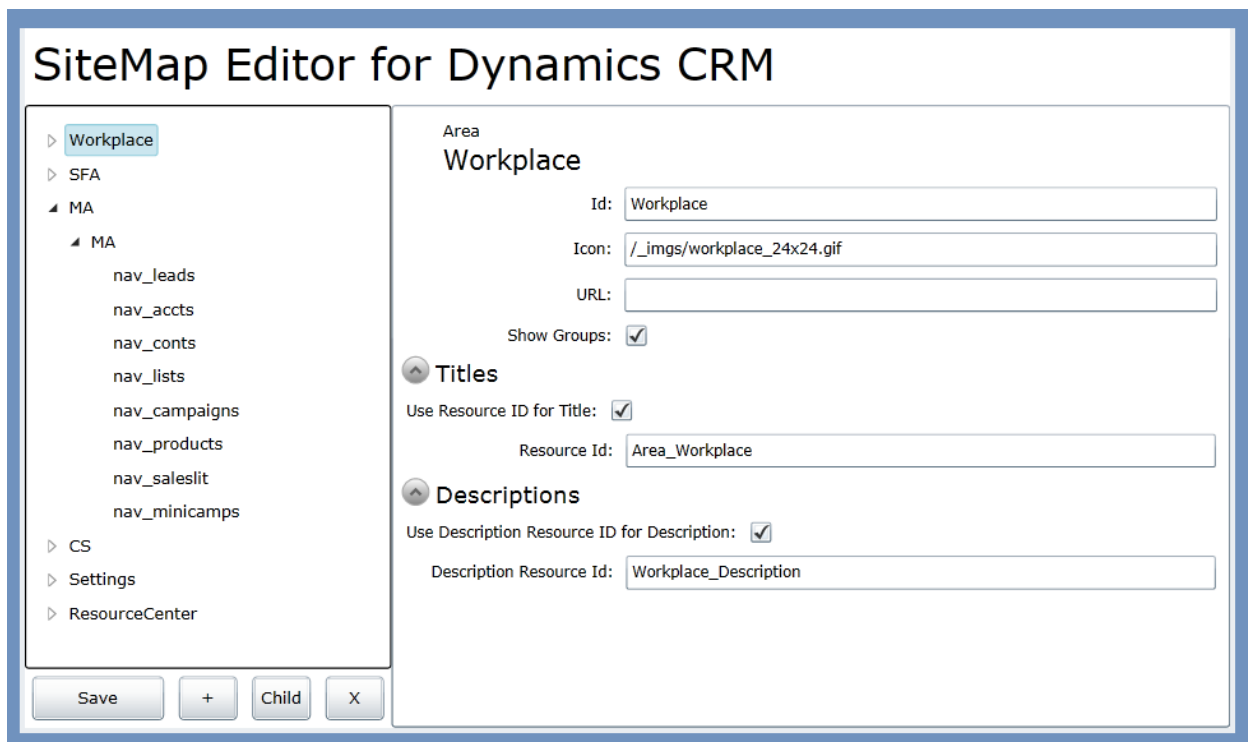
Before updating the sitemap, make sure to have a local copy of the current one. This is to easily revert to the previous sitemap whenever you feel that you do not want to go with the changes you made. To save a local copy:

- Create a new solution by going to **Settings** -> **Solutions** -> **New**, set all the needed information and click on the **Save** button.
- Go to **Client Extensions** under Components, click on **Add Existing** -> SiteMap and click on the **Save** button.
- Then click on **Export Solution**, go through the Export Solution wizard, and save the exported solution.

If you want to revert to your previous sitemap, just reimport the solution that you have exported and publish all customizations.

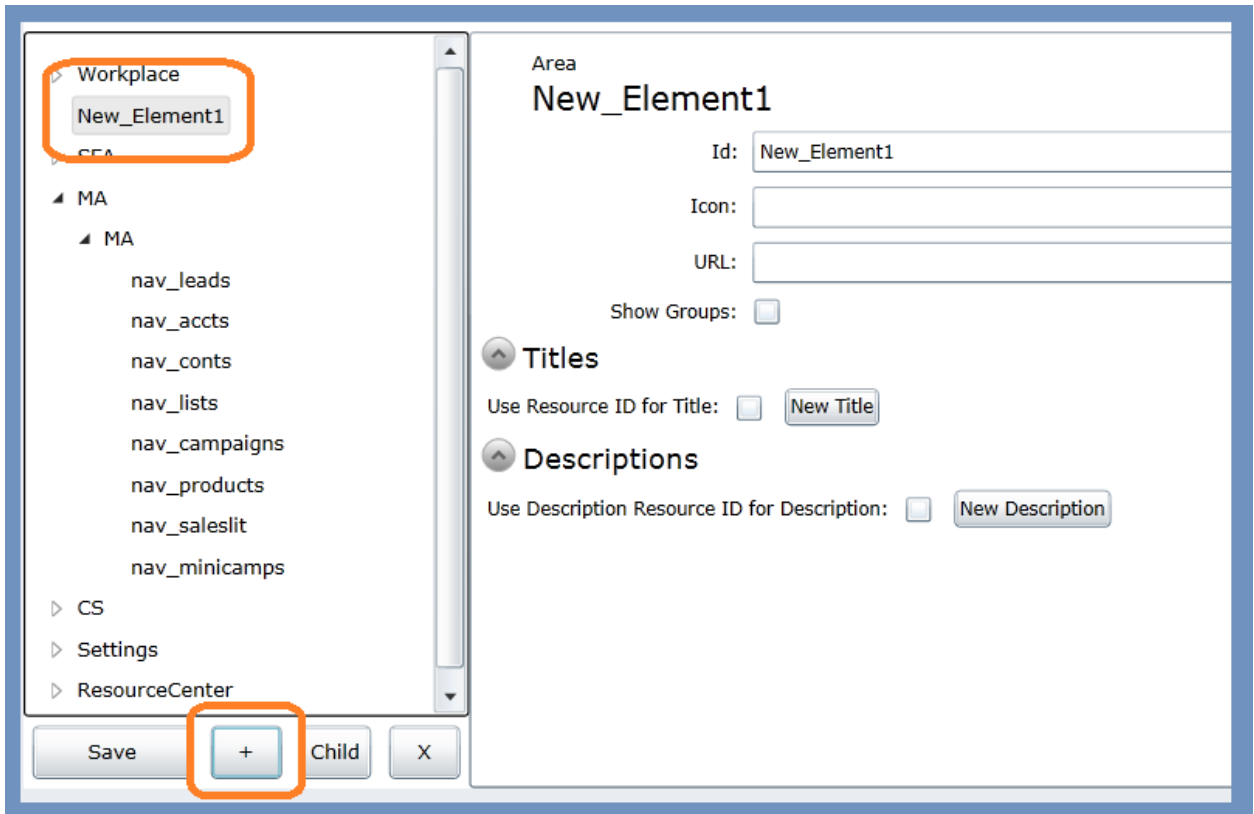
Accessing the SiteMap Editor

Double click on the Microsoft Dynamics CRM SiteMap Editor solution in **Settings** -> **Solutions**, and go to **Configuration** to load the editor. You will notice that the areas, sub-areas and groups are loaded at the left pane (the Navigation Pane), and the editing pane is at the right side. Areas are the first level of elements, followed by groups in the second level, and sub-areas at the bottom level as shown in the image below.

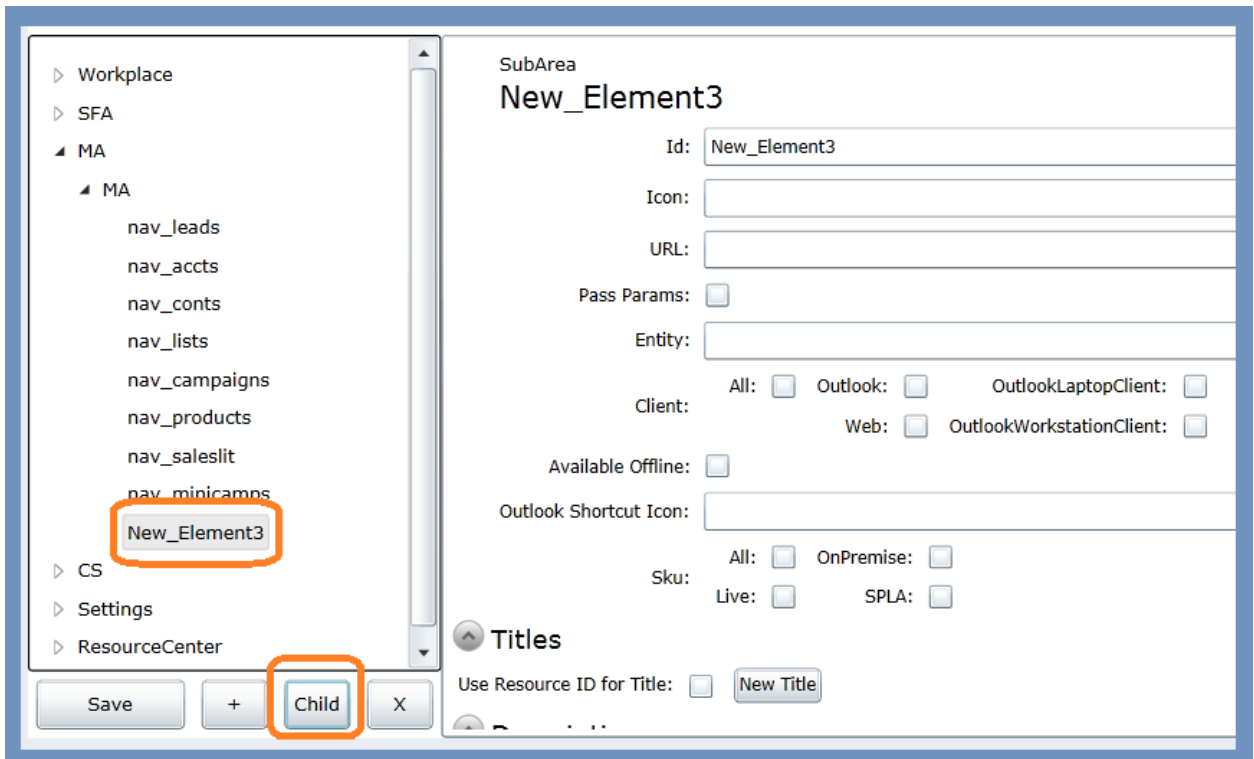


Adding Elements

- To add an element (sibling or same level), select an element of the same type (e.g. Area), and click on the **+** button at the bottom of the left pane. This would add an element next to the selected element (see image below).



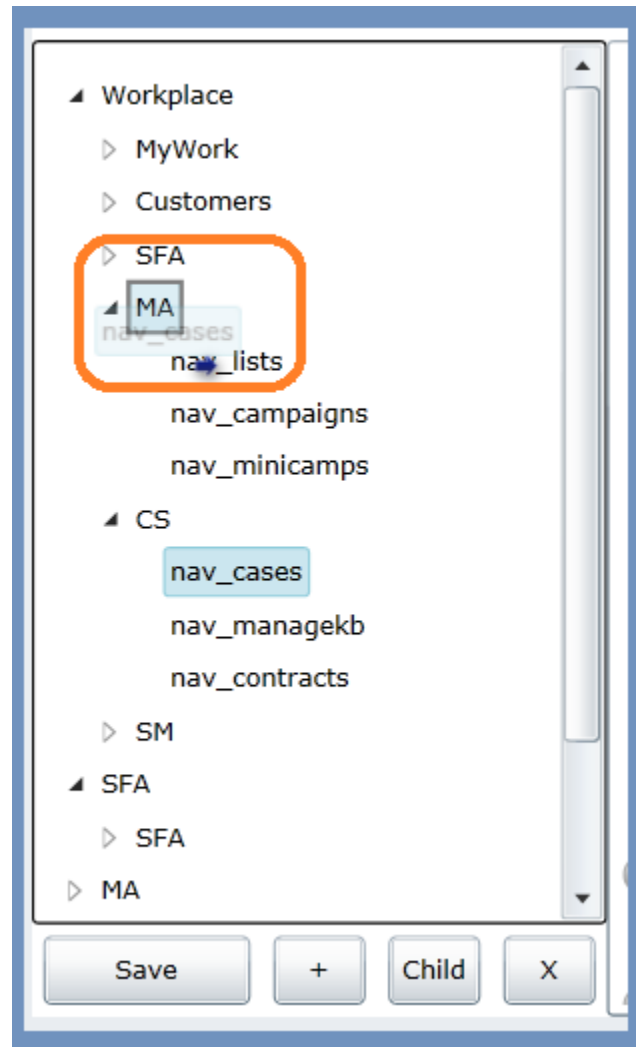
- To add a child element (Group or Sub-Area), select a parent element (Area or Group), and click on the **Child** button (see image below). Adding a child to an area would create a new group, and adding a child to a group would create a new sub-area.



- After filling in all required attribute values for the new element, click on the **Save** button at the bottom of the left pane to save changes to the sitemap. Make sure to publish all customizations and refresh your CRM instance to view changes made.

Moving Elements through Drag and Drop

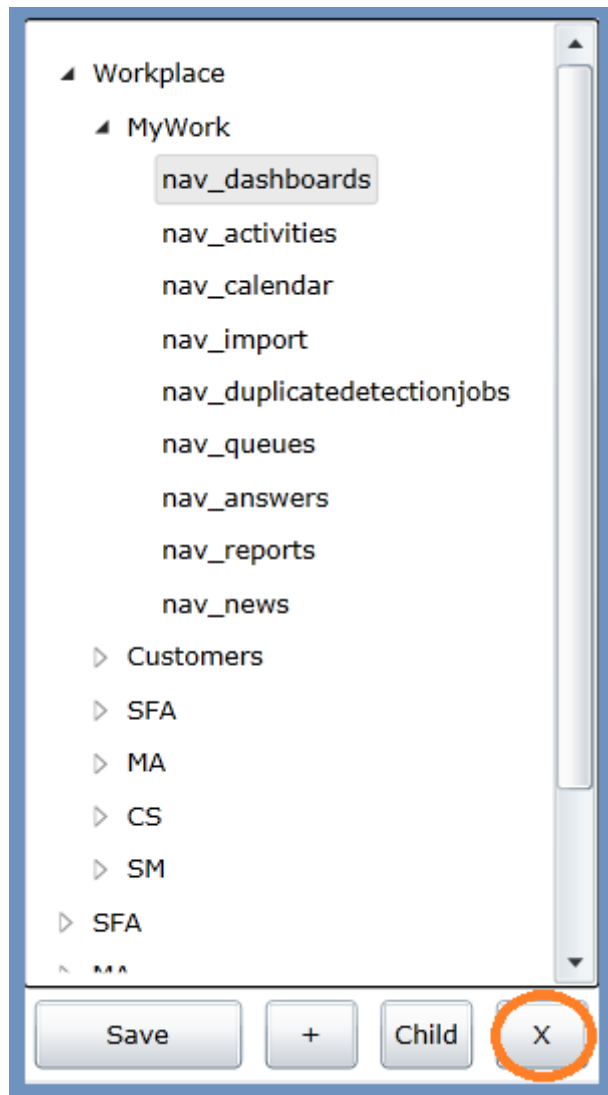
If you want to rearrange the order of the elements, you can select an element, and drag it to the target location. You will know that an element can be dropped under a specific element if you will see a gray border appearing as seen in the image below.



There is currently a known bug where even if an item was not selected, it would appear as if an element was selected and is being dragged. To mitigate this issue, just press the **ESC** key.

Removing Elements

- To remove an element, simply select the element to remove, and click on the **X** button. Note that if an element is a parent element, this action would also remove all sub-elements under it.
- Click on the **Save** button at the bottom of the left pane to save changes to the sitemap. Make sure to publish all customizations and refresh your CRM instance to view changes made.



Updating Titles or Descriptions

- To add a title, just uncheck **Use Resource ID for Title**, click on the **New Title** button, fill-in the LCID and corresponding title string.
- To add a description, just uncheck the **Use Description Resource ID for Description**, click on the **New Description** button, fill-in the LCID and corresponding description string, similar to that of titles.
- To delete an added title or description, simply click on the **X** button at the right side of the title/description string.
- **NOTE:** The resource ID is for internal use only and should not be changed. Changing it might cause an incorrect configuration of your sitemap which would cause your system to revert to the default sitemap.

Workplace

- MyWork
- Customers
- SFA
- MA
- CS
- SM
- SFA
- MA
- CS
- Settings
- ResourceCenter

Group
MyWork

Id: MyWork

Icon:

URL:

To Profile:

Titles

Use Resource ID for Title:

Resource Id: Group_MyWork

Descriptions

Use Description Resource ID for Description: **New Description**

LCID: 1033 **X**

Save + Child X