xRM Consultancy

Specialist Microsoft CRM Services

Tagging for Microsoft Dynamics CRM (v3)

An easy and intuitive way to apply 'tags' to records in CRM

Why tagging?

Tagging has become a very normal way for content creators and consumers to apply unstructured categorization to information. You are probably already very familiar with concept of tagging in applications and services such as Twitter, Blogs, Outlook, SharePoint – in fact probably the majority of systems you interact with on a day to day basis provides tagging features. Except Microsoft Dynamics CRM that is! Until now…

The benefits of tagging are well documented, some we have listed here:

1. Allows users to add terms meaningful to the user creating or editing information (and not just those terms allowed by a single classification authority)

2. Establishes relationships between information stored in records and the people connected to the information (both content creators and consumers)

3. Is easy to undertake, and users feel comfortable doing it

4. Great for aggregating information, and harnessing the collective categorisation of users

5. It provides multiple access points to information instead of just structured relationships

6. Allows discovery of a range of other items tagged by other users

7. It gets everyone involved as people freely choose the relevant tags they regard as appropriate to their own information and the information of others

What does the Tagging solution do?

xRM Consultancy's Tagging solution allows users to 'tag' any record in CRM with either their own tags or previously entered tags. It can be configured so that only a predefined set of tags can be used however the normal set up is that anyone can contribute to the tag 'pool'.

User's simply enter a word or phrase they wish to tag a record with. As they start typing existing tag matches (including matches against any synonyms associated with the tag) are automatically displayed for users to select, and if no match is found the user's new tag is added to the Tag 'catalogue' (if they have the appropriate security roles – see Security Roles section below for more details). The Tag catalogue is a very simple Organization level entity (this means tag records are not 'owned' by any user and are available to for all users to see – provided they have at least read access to the entity).

When a 'tag' is associated with a CRM record a Connection is made automatically (using the standard CRM Connections functionality) to save the Tag association. Because we are using the Connections functionality you can use Advanced Find to query your tag associations.

With version 3 of our Tagging solution you can now tag multiple records at once and add color coding to your tags.

Dashboard

A sample "Tagged Content" dashboard is provided to show the tagged items. Users can filter and search tags, view Tag charts and open Tag records from within the dashboard.
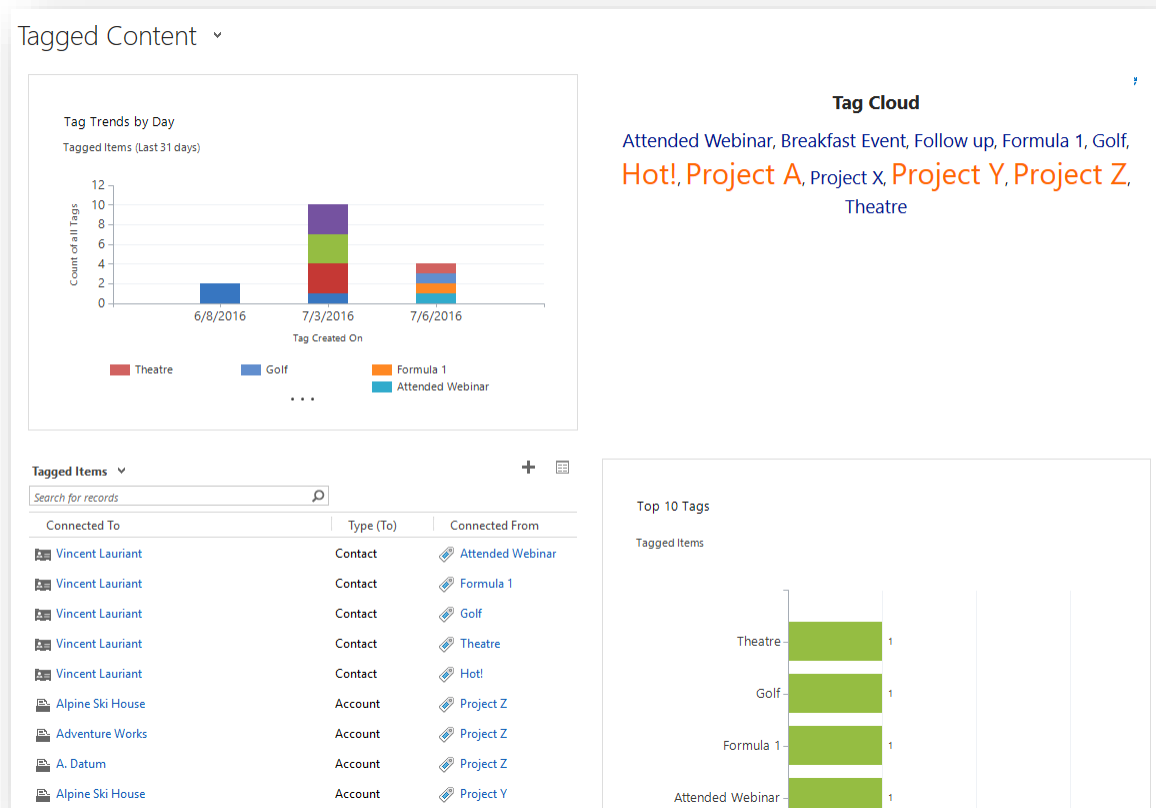

Auto posts to "what's new" feed

The Tagging Solution provides a workflow that posts new Tag associations to the "what's new" feed. By default only standard CRM entities are configured but you can modify the workflow to add custom entities.

Tag record

The Tag record shows all records connected to the tag. The associated records can be opened directly from the Tag record window.

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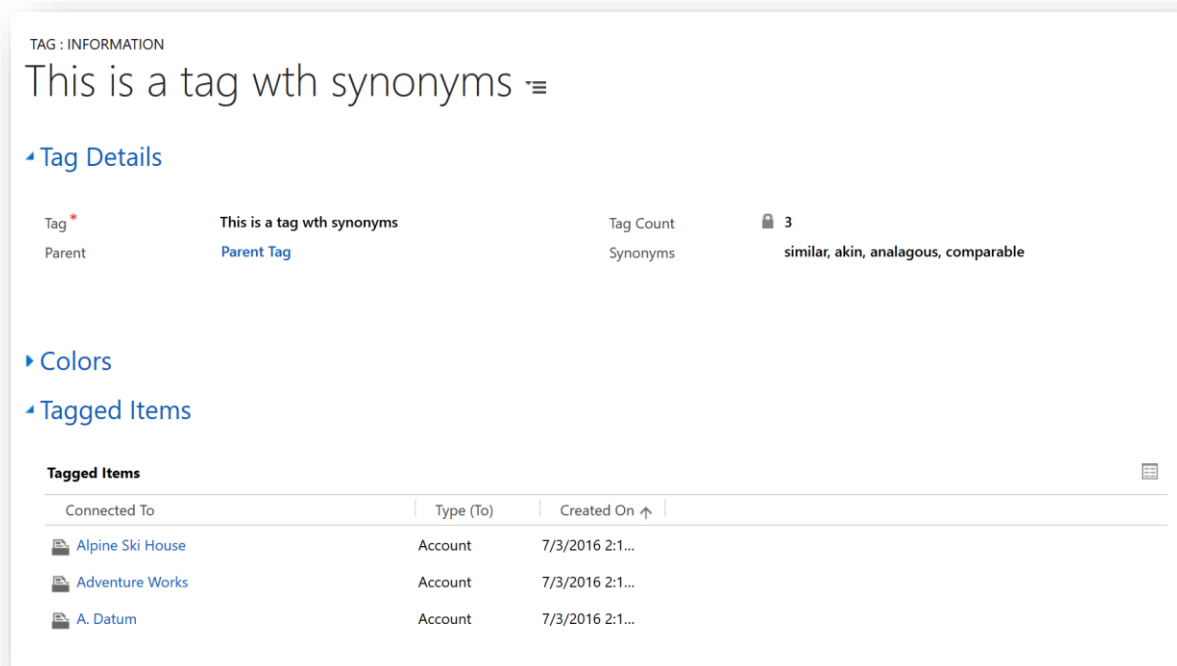
Synonyms

A Tag can have a list of comma separated synonyms associated with the Tag. When a user is typing in the Tag form area, if any of the synonyms match, the Tag will be available for selection in the Tag search results.

Parent Tags

A Tag can be designated as a 'Parent' which allows categorization of Tags. You are able to specify a parent tag name or names for a given Tag entry box on a record form and then only Tags in with this parent will be shown in the search results. Tags created when a parent is specified will be created and automatically assigned to this parent. See example form below with 3 tag entry boxes each with a parent tag specified:

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See the section below for the configuration options.

Tag Colors

You are able to customize the color of your tags. This can make important tags stand out or can be used to group similar tags. You have the ability to select a color for the tag background, border and font color.
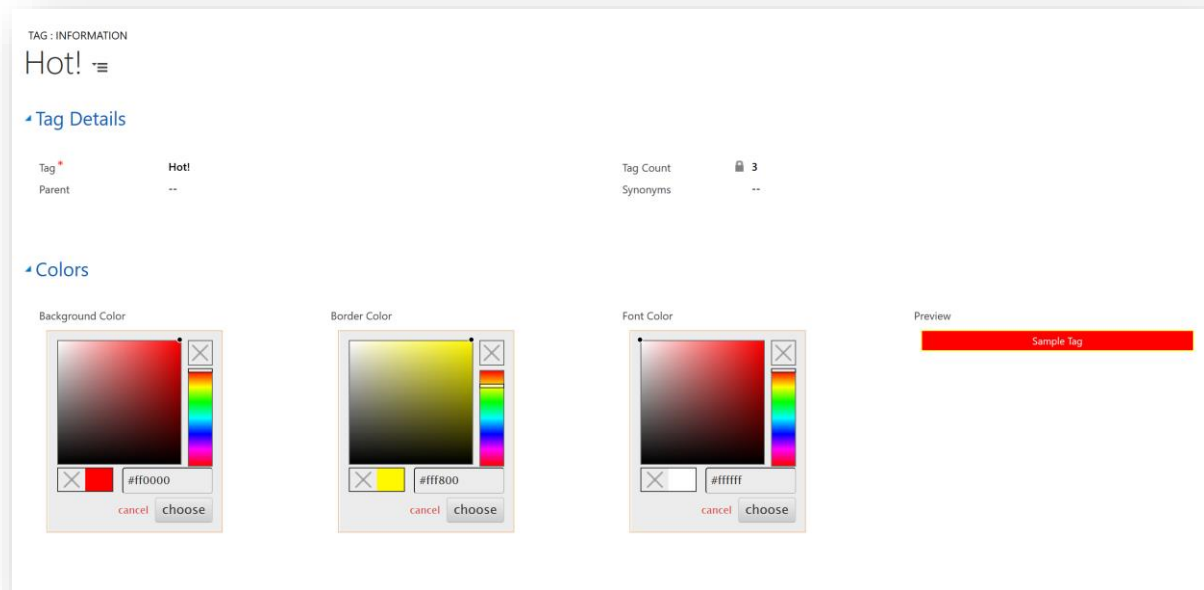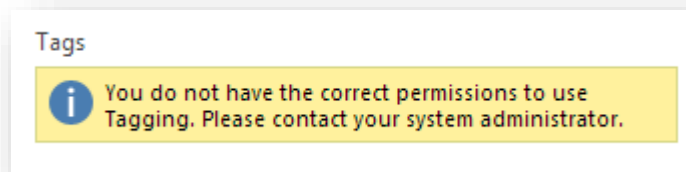

Expand the Tag Color tab on the form to set the color using the built-in color pickers.

Security Roles

The Tagging Solution comes with 3 security roles which provide different levels of Tagging functionality. A user must have one of the 3 roles otherwise they will be presented with the following error:

The 3 roles are:

Tag Reader – allows the user to see the tags already associated to a CRM record. This user cannot add new tags to the record.

Tag Associator – allows the user to see tags already associated to a CRM record and add associate further tags from a catalogue of already defined tags. This user cannot add new tags to the Tag catalogue but is able to remove the associated tags from the CRM record.

Tag Writer - allows the user to see tags already associated to a CRM record and add associate further tags from a catalogue of already defined tags or create a new tag (which is also added to the catalogue). This user can remove the associated tags from the CRM record or delete Tags records. Deleting a Tag

record from the catalogue will remove the tag association from all records that were associated with the record.

Download for free

Tagging from xRM Consultancy is currently available as a free or purchased managed solution download. The free solution allows you to create up to 25 tag connections. If you would like us to extend the capability of Tagging please get in touch – sales@xrmconsultancy.com.

Installation

Import the Tagging solution

1. Download the managed solution from http://www.xrmconsultancy.com/what-we-do/tagging-for-microsoft-dynamics-crm/
2. Navigate to **Settings > Customization > Solutions** and choose **Import** from the gird menu.
3. Locate your downloaded solution zip file and follow the instructions in the import wizard.
4. Publish Customizations.

### Enter License Key (not required to try)

1. Make sure you have purchased your key
   a. Purchase from http://www.xrmconsultancy.com/what-we-do/tagging-for-microsoft-dynamics-crm/
2. Open the Content Tagging solution from your Solution list

3. Make sure you are on the Configuration page
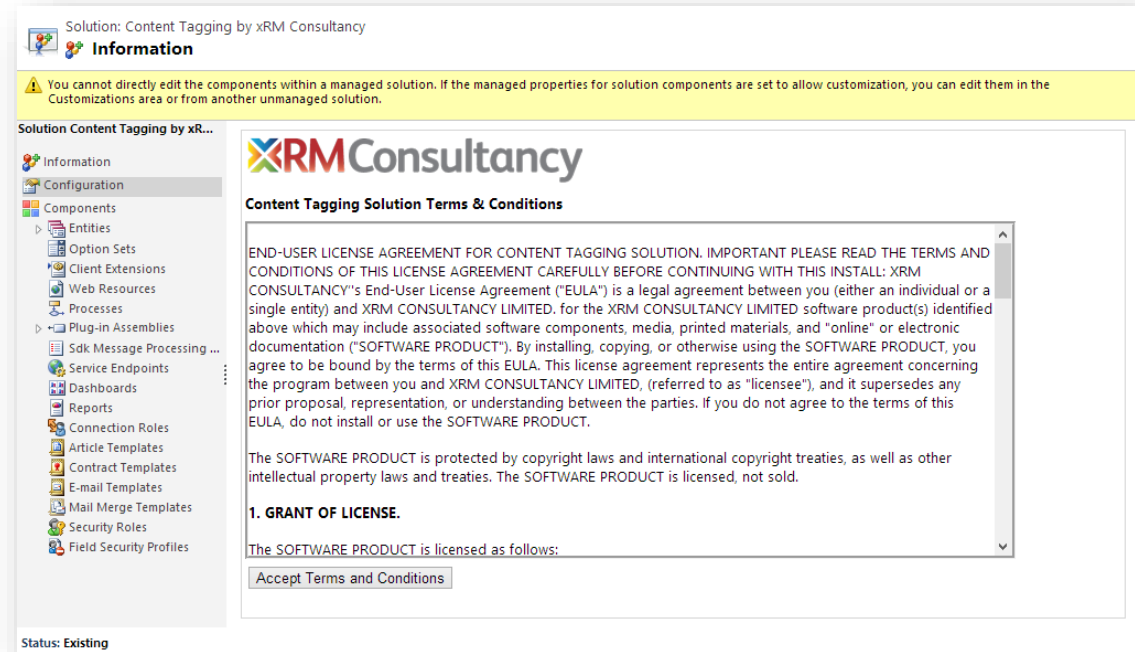
4. Click **Accept Terms and Conditions**
5. A few seconds may pass before you are presented with a link to the Configuration record:
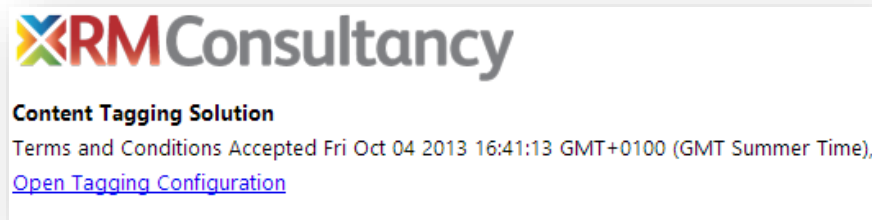
6. Open the Tagging Configuration record and enter your License Key

7. Close the configuration record and you will be able to create as many tag connections as you like!

Configure your forms to display the Tags

To display the Tags area you will need to modify your existing forms (or create a new one). We haven't included any preconfigured forms as you (not us!) know where is best to place the Tags for your users. Don't worry it is easy to do if you don't know how – we show you how to set it up for the Account entity below, but the process is the same for any other entity.

1. As a User with Customization privileges navigate to an open an Account Record
2. From the **…** (more commands) menu item choose **Form Editor** or the Customize tab (classic forms) choose **Form** to open the form editor.
3. Select the tab you wish to position the Tags (or create a new Tab)
4. From the ribbon select **Insert** > **Web Resource** tab
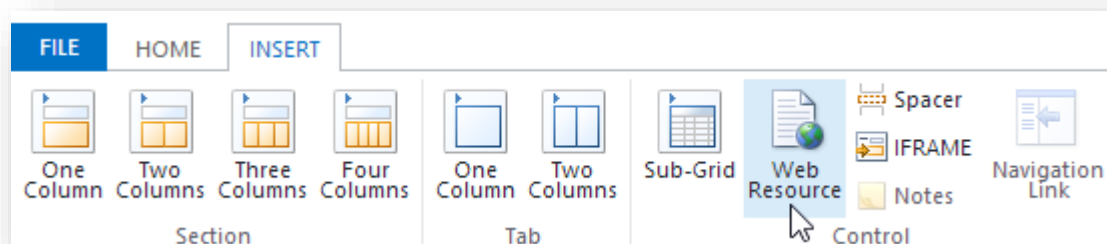
5. Search for the **Tagging.html** web resource and configure the settings on the General and Formatting tabs exactly as below. We recommend that Tag web resource occupies at least 10

rows on the form for optimal viewing.

6. Save and Publish your form
7. Refresh the Account Record and you should see the Tag section

Optional Parameters

There are optional parameters that let you control the behaviour of the Tagging form interface:

1. **resultslimit** – default is 5. This option determines how many Tags are shown in the drop down list that match the current search criteria. You should alter the Row Layout (on Formatting tab) to match this parameter. It is useful for when you only want the Tagging interface to only take up only a specific number of rows in your form. Minimum suggestion is 5.

2. **minsearchchars** – default is 2. This option determines how many characters a user must type before any matched Tags will be returned in the drop down list. Useful for enhancing performance when your Tag library is many thousands of records.

3. **parent** – default is for Tag search results to show all Tags. Setting the parent parameter allows you to specify one or more Tags that have been designated as "parents" (i.e. they can have child tags associated to them). Multiple values can be specified and are separated by a comma. When a parent is specified new tags that are created have this parent defined. If

there is more than one parent specified then new tags are created with a parent of the first parent specified in the list.

4. **excludeparent** – default is for Tag search results to show all Tags. This option allows you exclude specific Tags which have the defined parent or parents. Multiple values can be specified and are specified by a comma. New Tags are created without a parent defined.
5. **allowparentselection** – default is 'false'. Set to 'true' to enable Tags which have been defined as parents for selection in the search results.

Separate the parameters by the pipe character: |

Example: resultslimit=10|minsearchchars=3|parent=Preferred Music Type, Interests|allowparentselection=true

Example: resultslimit=10|minsearchchars=3|excludeparent=Interests,Events

Configure the Tag cloud for a Dashboard
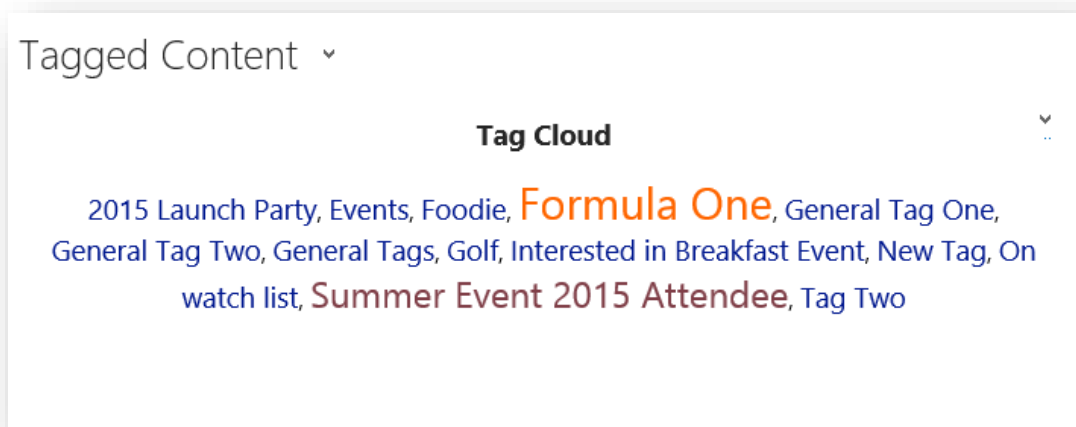
To add the Tag Cloud to a Dashboard select the xrmc_/TagCloud.html web resource. All tags associated to records are displayed by default. If you wish to display the Tag Cloud for a specific parent tag enter parent=[parent tag name] in the Custom Parameter field (see below).
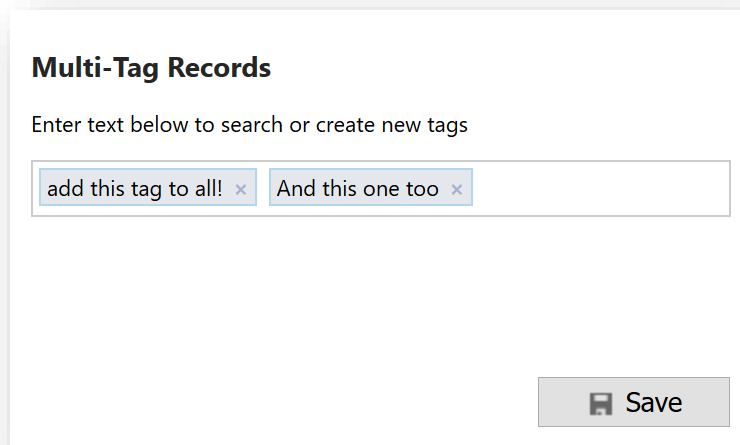
Multiple record tagging

With version 3 it is now possible to allow users to tag multiple records at once. There is some set up required to enable this on your specific entities – see section below on how to configure manually, however for convenience we have a preconfigured solution that you can install to enable multiple record tagging for Accounts, Contacts, Cases and Opportunities. Please download the Ribbon Buttons solution from the Tagging page on our website: www.xrmconsultancy.com/what-we-do/tagging-for-microsoft-dynamics-crm/

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Multi Tag button to add tag to multiple records at once:
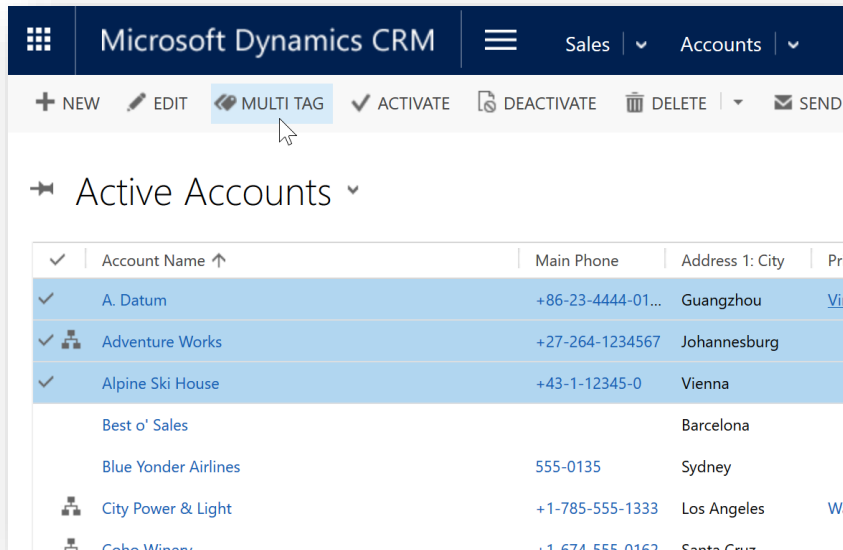

The multi-tag pop up window:

Multi-tag progress bar:
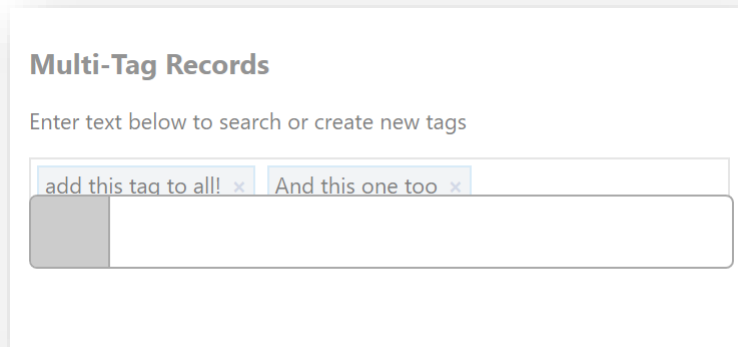
Configuration of multiple record tagging

To add a new MultiTag button to the command bar we recommend using the Ribbon Workbench (http://www.develop1.net/public/page/Ribbon-Workbench-for-Dynamics-CRM-2011.aspx) to assist you.

1. Create a new solution and add the entity you want to customise to it ensuring to add the 3 xrmc_ web resources in this screenshot:
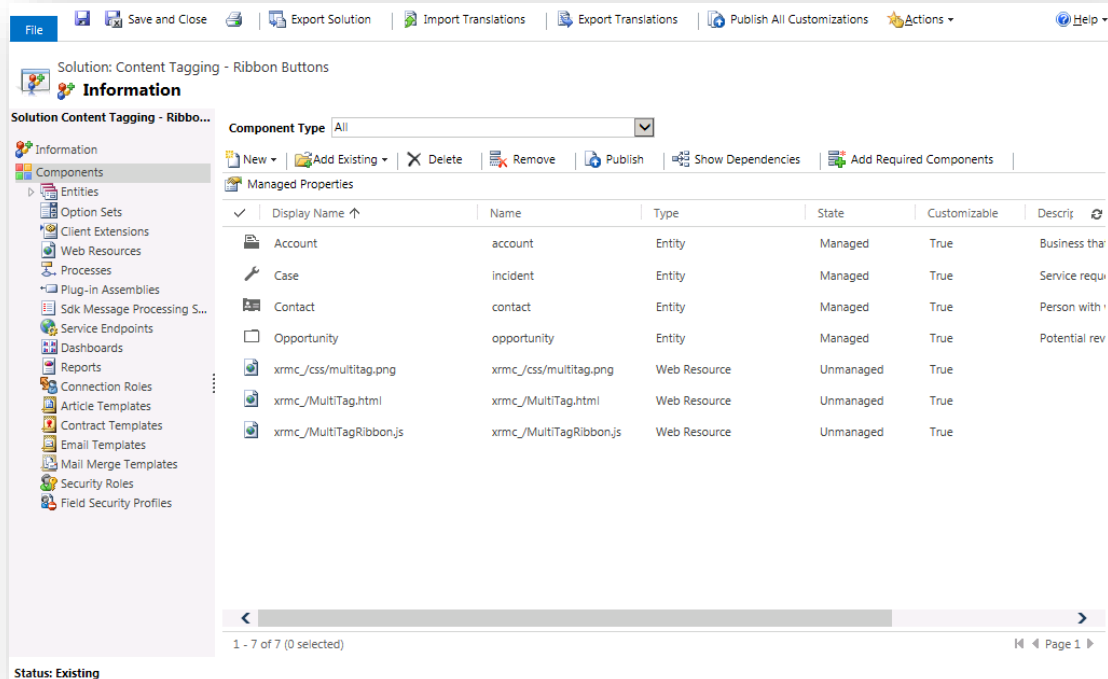
2. Launch Ribbon Workbench and once it opens select the solution you just created.
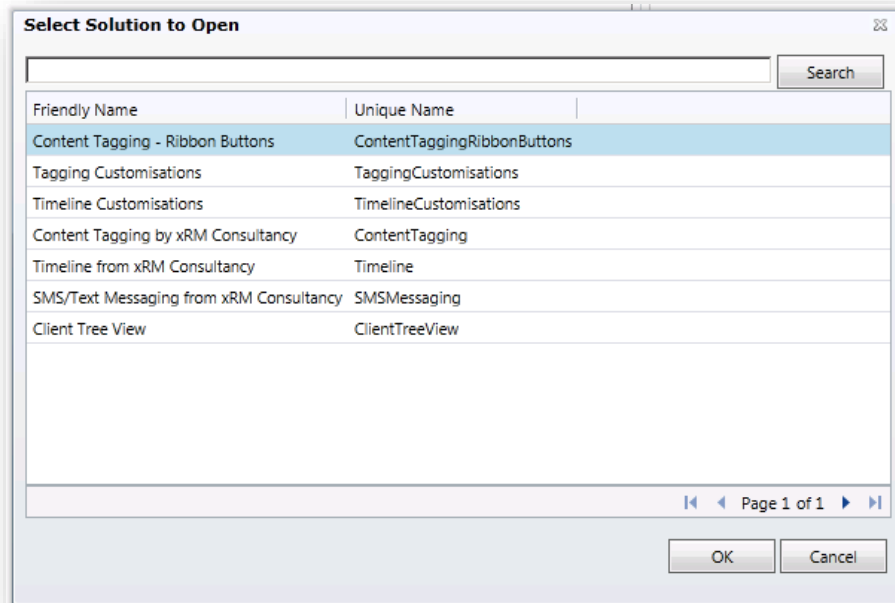

3. Add a command to execute the MultiTag function:
   - Select the **entity** you with to customise
   - Right click on **Commands**
   - Click **Add New**
   - Give the command a **name**, for example, **custom.account.MultiTag.Command**
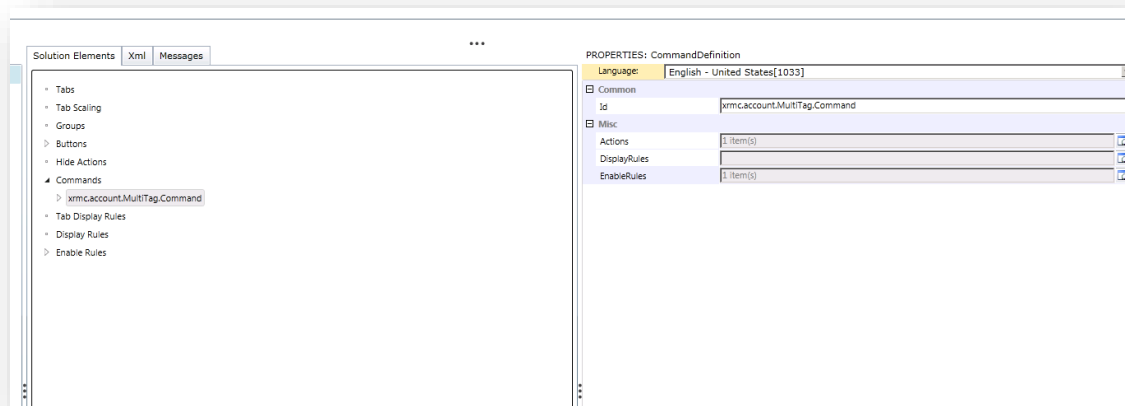

4. Click on the lookup icon to add a new action. Then click on the add button to add a new JavaScript Function Action. The function you will want to call is **openMultiTag** and select the

WebResource called **$webresource:xrmc_/MultiTagRibbon.js**.
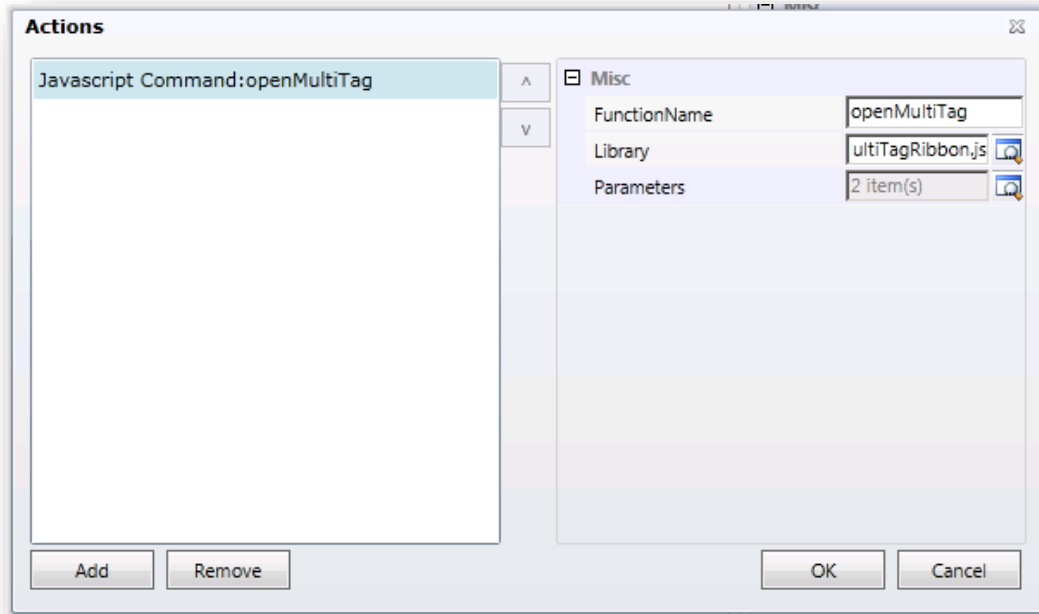
5. Now you need to add 2 parameters to this function so that it detects what was selected in the grid:
   - Click on the lookup icon beside the parameters box
   - Click the **Add** button and add a **Crm Parameter**
   - Set the value to S**electedControlSelectedItemReferences**
   - Click the **Add** button and add another **Crm Parameter**
   - Set the value to **SelectedEntityTypeName**
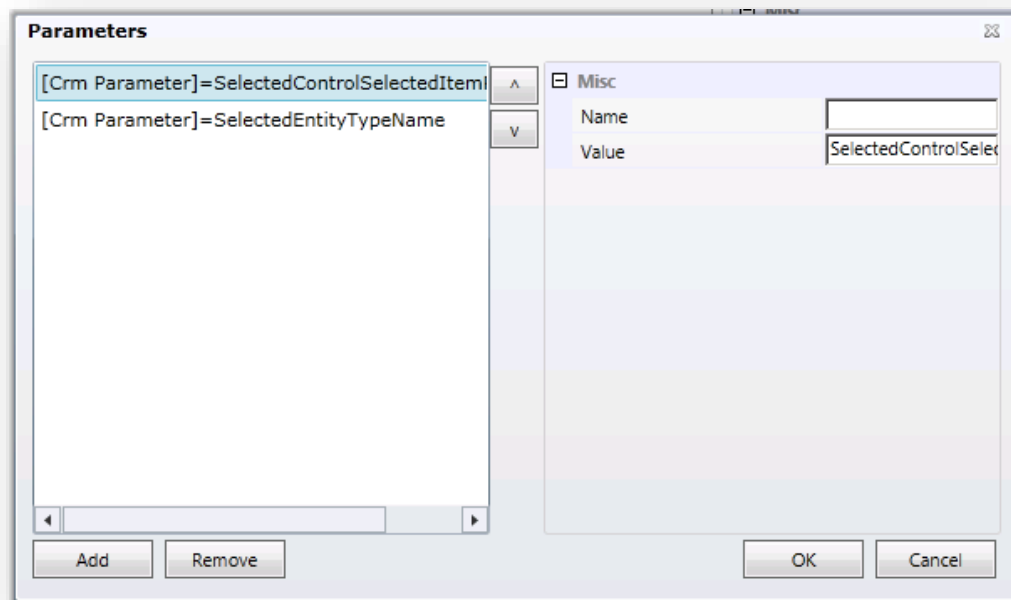
6. The final step to adding the command is the enable rule. MultiTag is only relevant if you have selected at least 1 record.
   - Click on the lookup icon beside the **Enable Rules**
   - Click on **+ Add New**
   - Give it a name, for example, **custom.account.MultiTag.EnableRule**
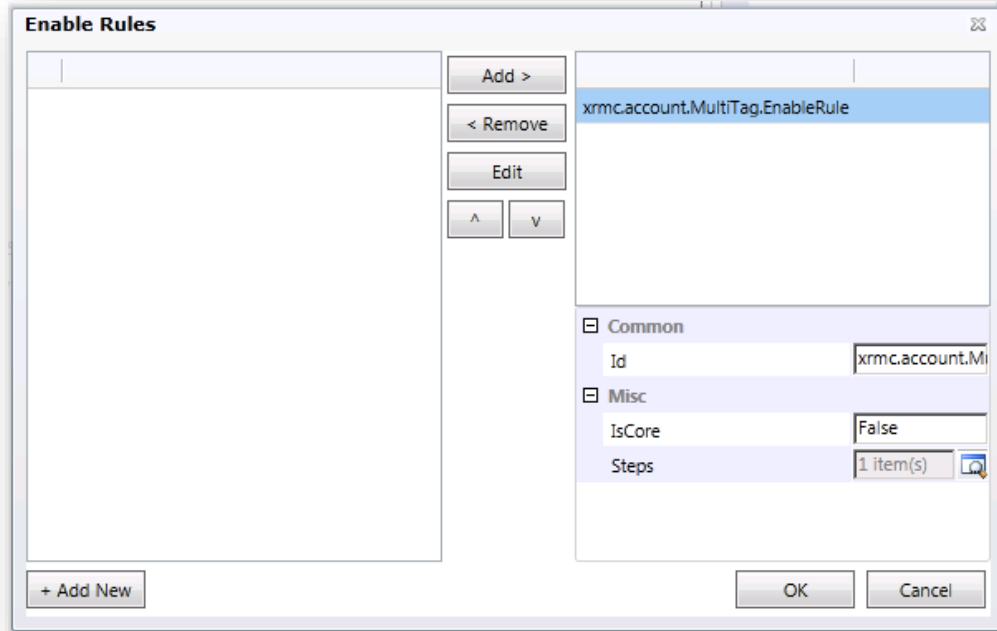
7. Create a step for the rule
   - Click on **Add Step** and add **Selection Count Rule**
   - Set **AppliesTo** to **Selected Entity**
   - Set **Minimum** to **1**
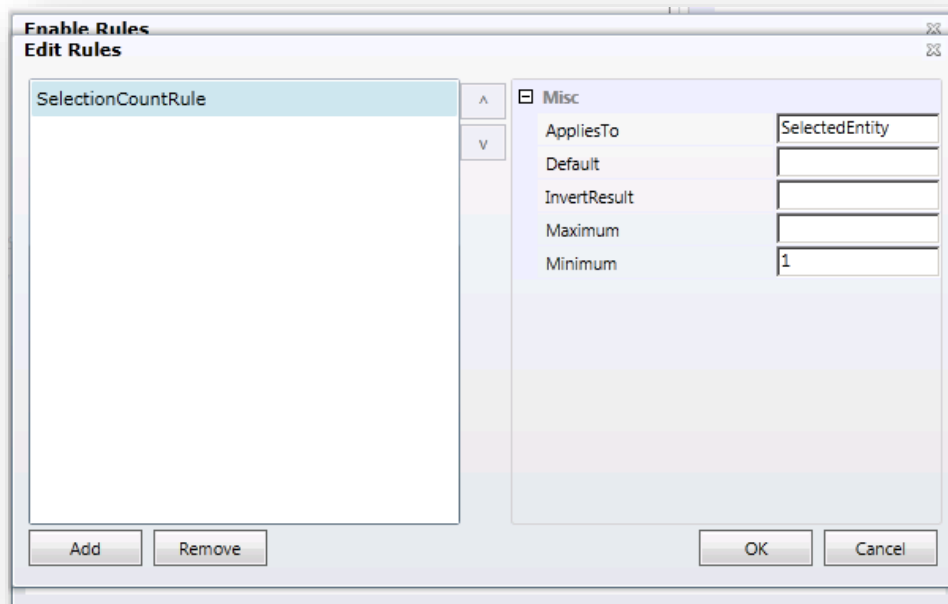
8. Now we can move on to the button itself. Click on **OK** to save everything until you get back to the main screen. To add a button simply drag a button from the toolbox on the left onto the appropriate command bar.
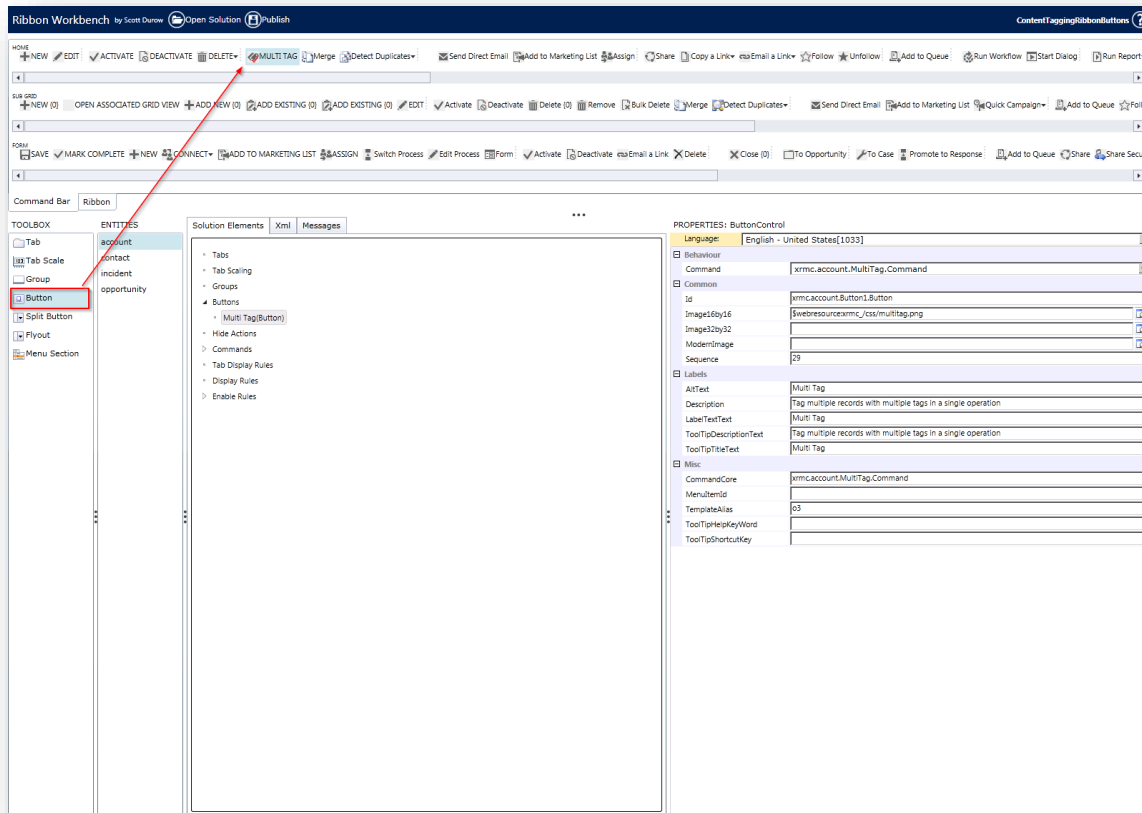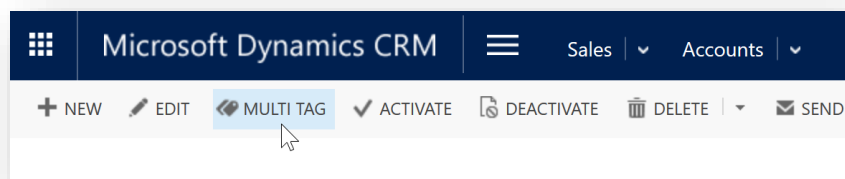

9. Give the button a name, for example, **custom.account.MultiTagButton** and set the button properties as per the following settings:

10. Publish your changes by publishing the solution you have just edited. Note if your changes don't appear right away publish the solution again and refresh your browser window.

Using parameters to change the behavior of the multi tag functionality

Just like you can add parameters to the Tag webresource for forms (e.g. restrict to specific tags) you can also use these parameters for the multi-tag input dialog.

1. Create a copy of the **MultiTagRibbon.js** webresource and give it an appropriate name e.g. **MultiTagRibbonParentEurope.js**
2. Add the parts in bold:
    var dataParam = 'parent=Europe';
    multiTagWindow =
    window.open('/WebResources/xrmc_/MultiTag.html**?data='+encodeURIComponent(dataParam)**, title, 'toolbar=no, location=no, directories=no, status=no, menubar=no, scrollbars=no, resizable=yes, copyhistory=no, width='+w+', height='+h+', top='+top+', left='+left);
3. Reference your webresource in step 4 of the mult-tag setup instructions in the previous section

Feedback

We welcome your feedback – support@xrmconsultancy.com.

Support

Please contact support@xrmconsultancy.com with any questions.