



GroupCalendar for MS CRM 2011

Version 5.0

User Guide

(How to use GroupCalendar for MS CRM 2011)

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1 User Guide

This guide gives detailed explanations of all functionalities provided by **GroupCalendar for MS CRM 2011**.

If you need to reach us, see the Contact page.

1.1 Why you should use GroupCalendar

GroupCalendar testimonial from one of our customers:

We had a need with our Microsoft CRM implementation to allow efficient scheduling of appointments for our salespeople by our telesales department. Native CRM calendaring did not give the functionality for one manager to see a quick, complete view of a subordinate's activities, so we searched for a solution - and found the excellent GroupCalendar. It allows our telesales department to quickly view scheduled activities of all salespeople so they spend more time creating appointments with revenue generating leads and less time trying to discover when a salesperson is available.

2 Introduction

GroupCalendar (GC) is an enhancement for Microsoft CRM 2011 that is designed to provide a comprehensive view of all activities associated with:

- a user
- a group of users
- resources
- and resource groups

With the GroupCalendar users now can view the calendars of one or several associated participants mentioned above, at the same time. So they can check for scheduling conflicts and also can check the activities for a team scheduling.

GroupCalendar for MS CRM 2011 gives you the ability to view these activities in a *day-, week- or month-view*. Within these views you can change between *Overview-, Gantt-, or Timeline-view*. The *Day-View* also provides the *TopDown View*.

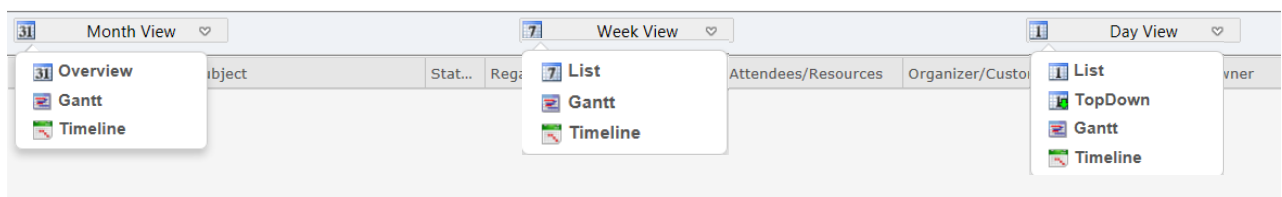
2.1 GroupCalendar Views

GroupCalendar for MS CRM 2011 provides different views:

- **Day View**
- **Week View**
- **Month View**

These views show all activities and appointments within the specific time. Activities and appointments can simply be opened with a double-click.

- **List View**
The List View shows all users' appointments and activities, listed chronologically and vertical at a glance, even when two appointments are scheduled at the same time.
- **TopDown View**
In this view the activities are separated per user to get a plain view of the activities.
- **Gantt View**
The Gantt-view offers Drag & Drop functionalities for activities, even between different users. This is especially helpful if users want to show the activities of many users.
- **Time Line View**
In Timeline-View, you can see all users' appointments and activities, listed chronologically and vertical at a glance, even when two appointments are scheduled at the same time.



2.2 GroupCalendar Overview

Change between Day-, Week-, Month - View

Select:

- a user
- a group of users
- resources
- and resource groups to see the activities.

Click on the drop down button to select the single views.

Shows selected user etc... independent from the different views.

GroupCalendar provides the possibility to define a specific color for each scheduled activity.

Move the cursor on an activity to get detailed information

Open or close the side bar by clicking on the small grey arrow (below the refresh-button). Click the small 'Pin/Un-Pin' -button to fix or unfix the menu.

Create a new activity and choose the activity type you want to display.

Right-click on an appointment to copy or to delete it. Double-click to open and to change the content.

COPY ACTIVITY
DELETE

GroupCalendar View Settings

Monday, 15 Jul 2013

Mo	Tu	We	Th	Fr	Sa	Su
27	1	2	3	4	5	6
28	8	9	10	11	12	13
29	15	16	17	18	19	20
30	22	23	24	25	26	27
31	29	30	31	1	2	3
32	5	6	7	8	9	10

Today

Extended Select:

Select Users/Resources

Settings

Users:

All Users/Resources

Which activities should be shown:

New Activity

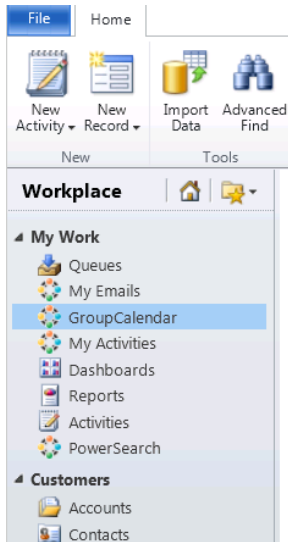
- Task
- Fax
- Phone Call
- E-mail
- Letter
- Appointment
- Service Activity

Options:

- Only attendees:
- Only open:
- TopDown activities only

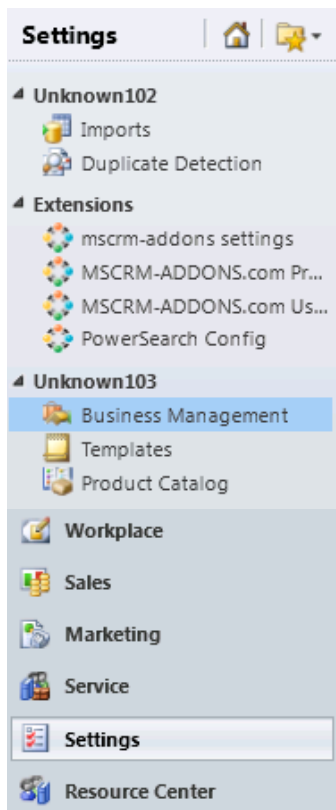
3 How To Use GroupCalendar

To access the GroupCalendar, select the side tab button from the "My Work" of Microsoft CRM 2011. When you open the GroupCalendar the first time you will see the activities from today.



3.1 Resource Management Functionality

Start in the Settings area of CRM Systems and go to Business Management and choose Facilities/Equipment or Resource Groups to get an overview.





Facilities/Equipment

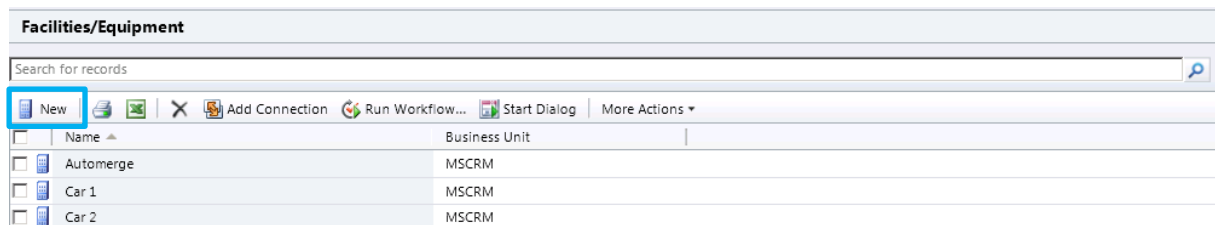
Add facilities and equipment for service scheduling. Modify information about resources and delete existing resources.



Resource Groups

Add new groups and new members to existing groups for service scheduling. Modify the group description and delete members from groups or the groups themselves.

For more details, click on one of the listed Facilities/Equipment or Resource Groups. A new Facility/Equipment or Resource Group can be defined by clicking the new button. If you click save and close and go back to the Group Calendar, you have an overview of all created appointments and activities.

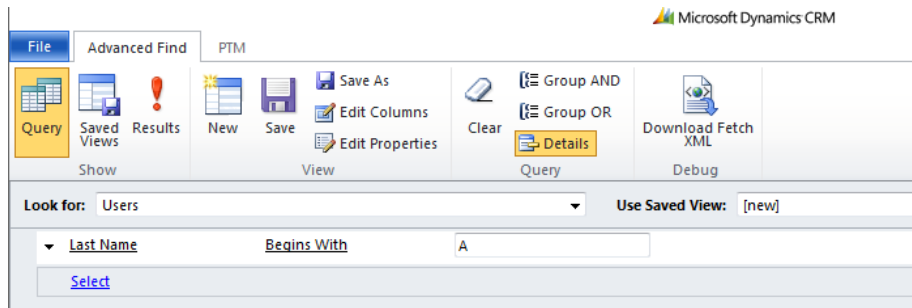


Facilities/Equipment	
Search for records	
New [Add Connection] [Run Workflow...] [Start Dialog] [More Actions]	
<input type="checkbox"/>	Name Business Unit
<input type="checkbox"/>	Automerge MSCRM
<input type="checkbox"/>	Car 1 MSCRM
<input type="checkbox"/>	Car 2 MSCRM

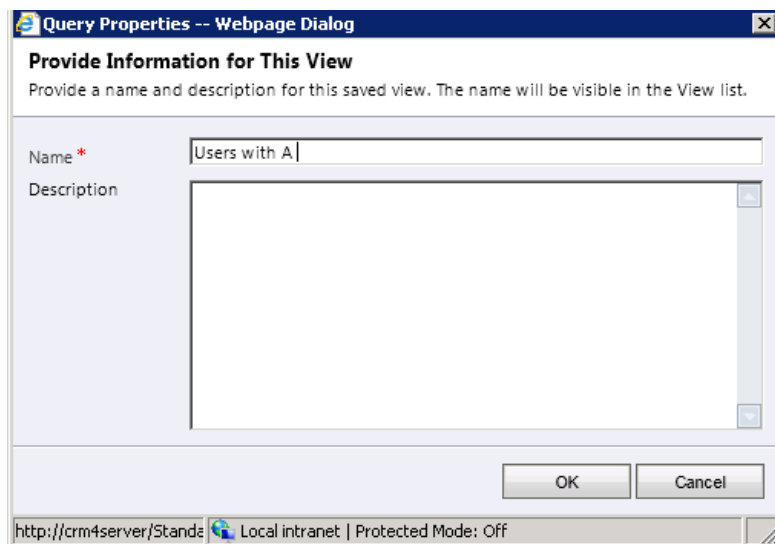
For more information please watch our YouTube video "Resource management with GroupCalendar for MS CRM 2011": <http://www.youtube.com/watch?v=afIrYUX7HEE>

3.2 Define Groups

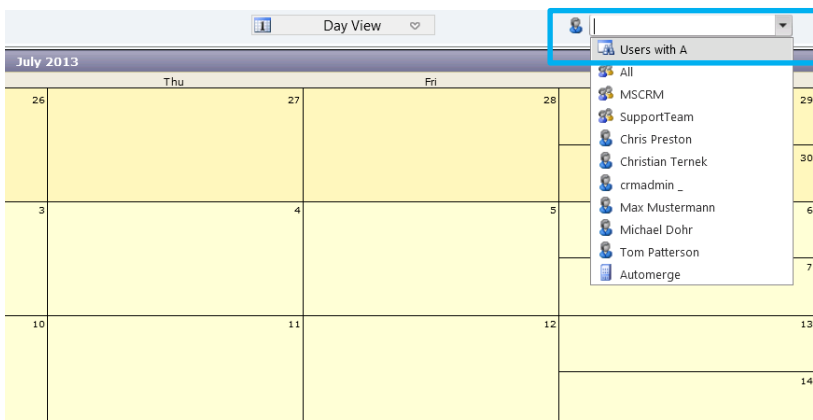
1. Open Advanced Find in MS CRM :
2. Change in the "Look For" Drop-Down-Listbox the type to "Users" and select the criteria's for the group of users you want to define.



3. Click on "Save as" and give the group a name.



4. Go back to the GroupCalendar and open the drop-down list box "Select Users". You will see now the new created group "Users with A". As a matter of performance you maybe have to refresh the user list. To do this, close the browser and start it again.

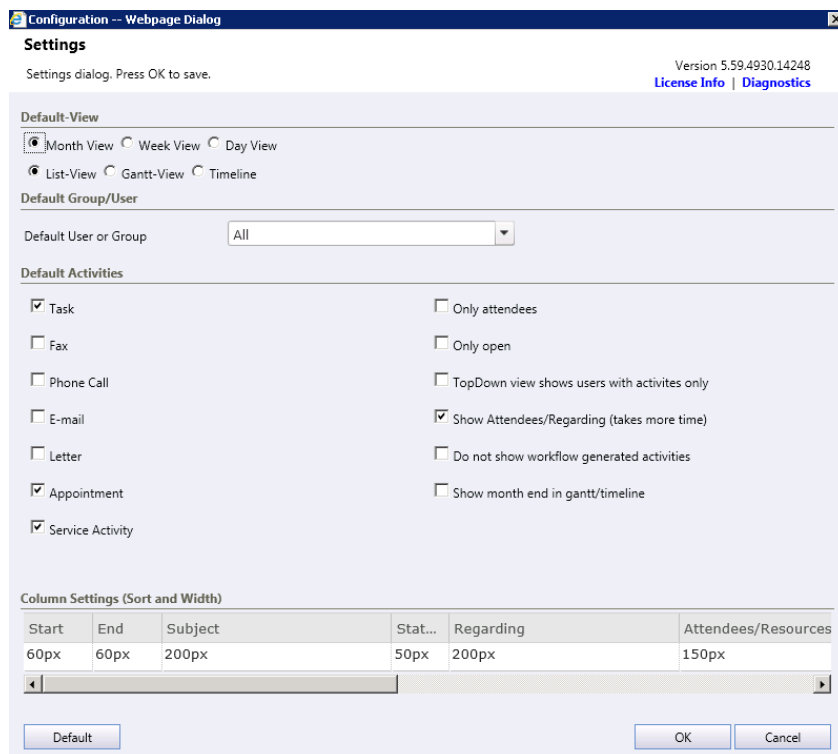


3.3 Default Settings

With clicking the "Settings"-Button on the Side-Bar, each user can configure the look and feel of the GroupCalendar as he wants.

What can be defined in the settings:

- Default view when opening the GroupCalendar
- Column width
- Column order
- Default user/group selection when opening the GroupCalendar
- Default filter criteria of the side-bar ...



Configuration -- Webpage Dialog

Settings

Settings dialog. Press OK to save. Version 5.59.4930.14248
[License Info](#) | [Diagnostics](#)

Default-View

Month View Week View Day View

List-View Gantt-View Timeline

Default Group/User

Default User or Group: All

Default Activities

Task Only attendees

Fax Only open

Phone Call TopDown view shows users with activities only

E-mail Show Attendees/Regarding (takes more time)

Letter Do not show workflow generated activities

Appointment Show month end in gantt/timeline

Service Activity

Column Settings (Sort and Width)

Start	End	Subject	Stat...	Regarding	Attendees/Resources
60px	60px	200px	50px	200px	150px

Default OK Cancel

In this window it is possible to define the default view when opening the GroupCalendar. It is also possible to define the default Group/User and filter criteria.

To change the position of the columns you have to modify the Sort-Column. This is done via drag and drop. Grab a column and drop it at the desired position. The slot where a column can be dropped will be highlighted on drag over.

Column width can be changed by dragging the edges of the column headers to either side to enlarge or shrink column.

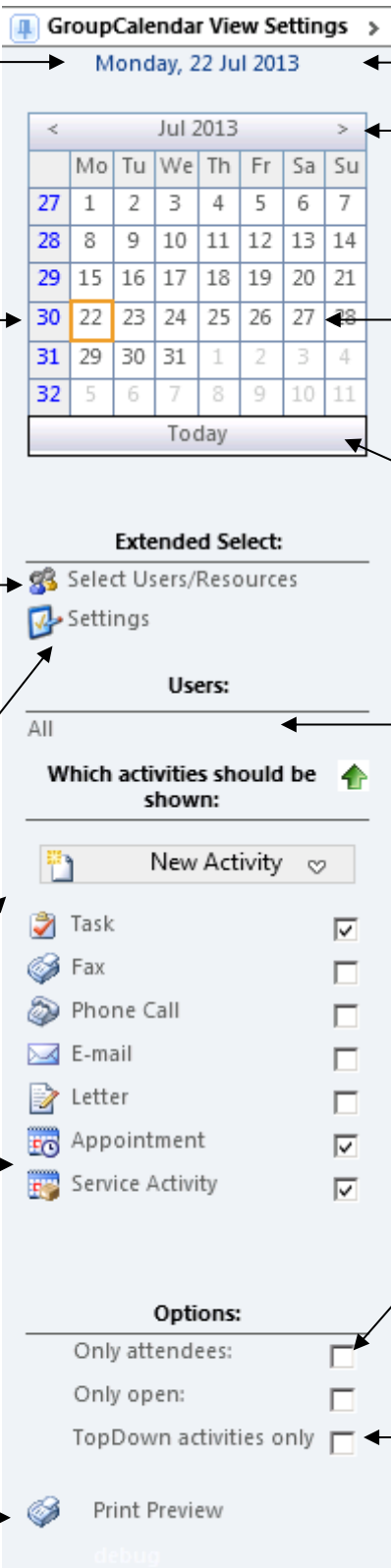
You could also double-click a column and enter the specific width for the column in pixel.

If you click on the grid header you can set the alphabetic sorting. With shift-click at the same time multiple assorting can be configured.

„Show Month end in Gantt/Timeline“: this function shows the remaining days of the week, if the month ends during the week.

4 Side Bar

The Side Bar is the same in every view. Day-, week-, and month view.



GroupCalendar View Settings >

Monday, 22 Jul 2013

< Jul 2013 >

	Mo	Tu	We	Th	Fr	Sa	Su
27	1	2	3	4	5	6	7
28	8	9	10	11	12	13	14
29	15	16	17	18	19	20	21
30	22	23	24	25	26	27	28
31	29	30	31	1	2	3	4
32	5	6	7	8	9	10	11

Today

Extended Select:

- Select Users/Resources
- Settings

Users:

All

Which activities should be shown:

New Activity

- Task
- Fax
- Phone Call
- E-mail
- Letter
- Appointment
- Service Activity

Options:

- Only attendees:
- Only open:
- TopDown activities only

Print Preview

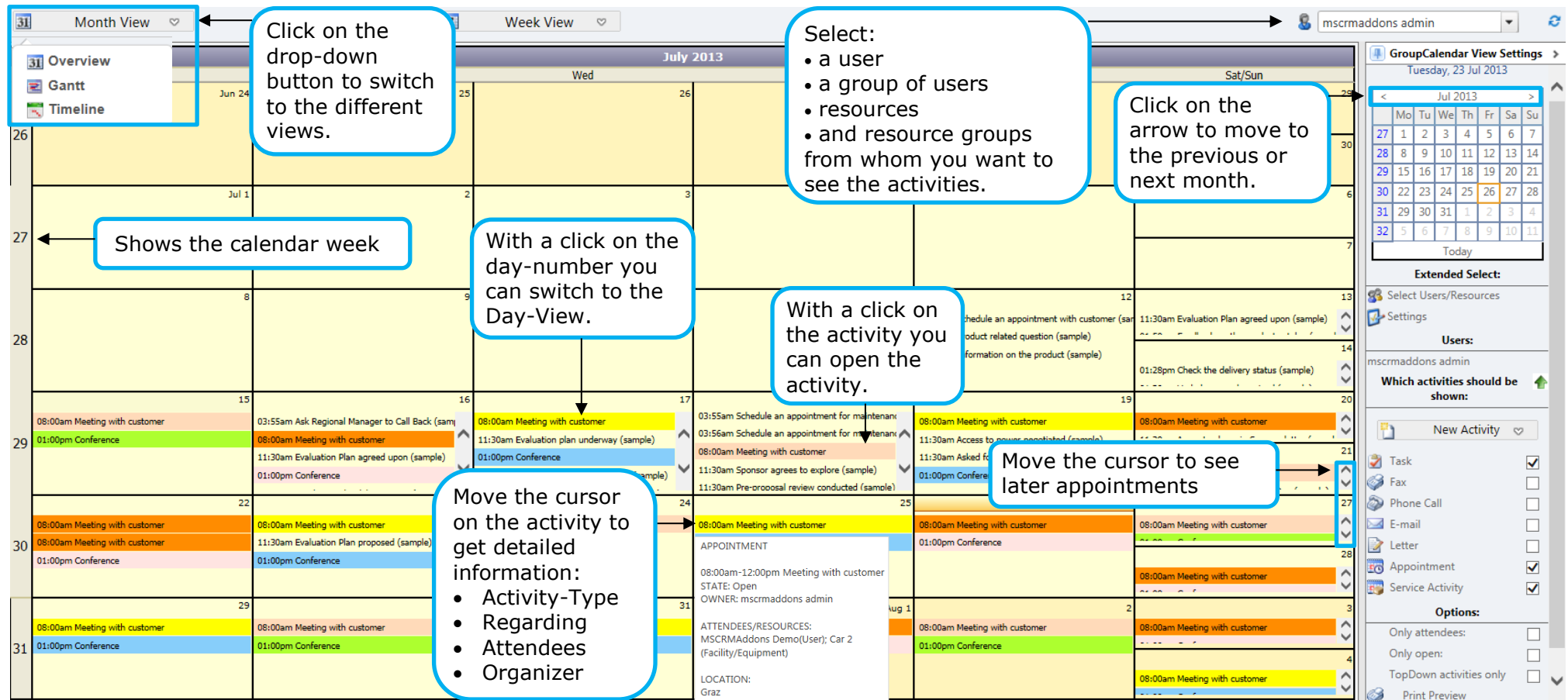
debug

Callouts:

- Open or close the side bar by clicking on the small grey arrow. Click the small `Pin/Un-Pin`-button to fix or unfix the menu.
- Shows the selected day.
- Select month and year with a click.
- With a click on the week number you change automatic into the week view of that week.
- With a click on the day you can switch to another day.
- Click on this button to switch to the day-view of today.
- Click this button to select more than one user. This is helpful to see the activities of many users at the same time.
- Shows you the actual selected:
 - a user
 - a group of users
 - resources
 - and resource groups
- With the "Settings" button each user can define his own personal settings of the **GroupCalendar**. (visibility of columns, width of columns,..)
- Click this button to define new activities and a date for your activity.
- The checkboxes allows the user to select activity-type should be visible in the GroupCalendar.
- Filter to show only the open activities where the chosen users are only attendees.
- Opens a Print Preview Window. The Print Preview is not available in Gantt-View
- Tell the TopDown View to hide all users, which have no activities on the selected date.

5 Month View (Overview)

GroupCalendar provides the possibility to define a specific color for each scheduled activity. For more information, please click [here](#) to read our blog "color-coding-functionalities for activities".



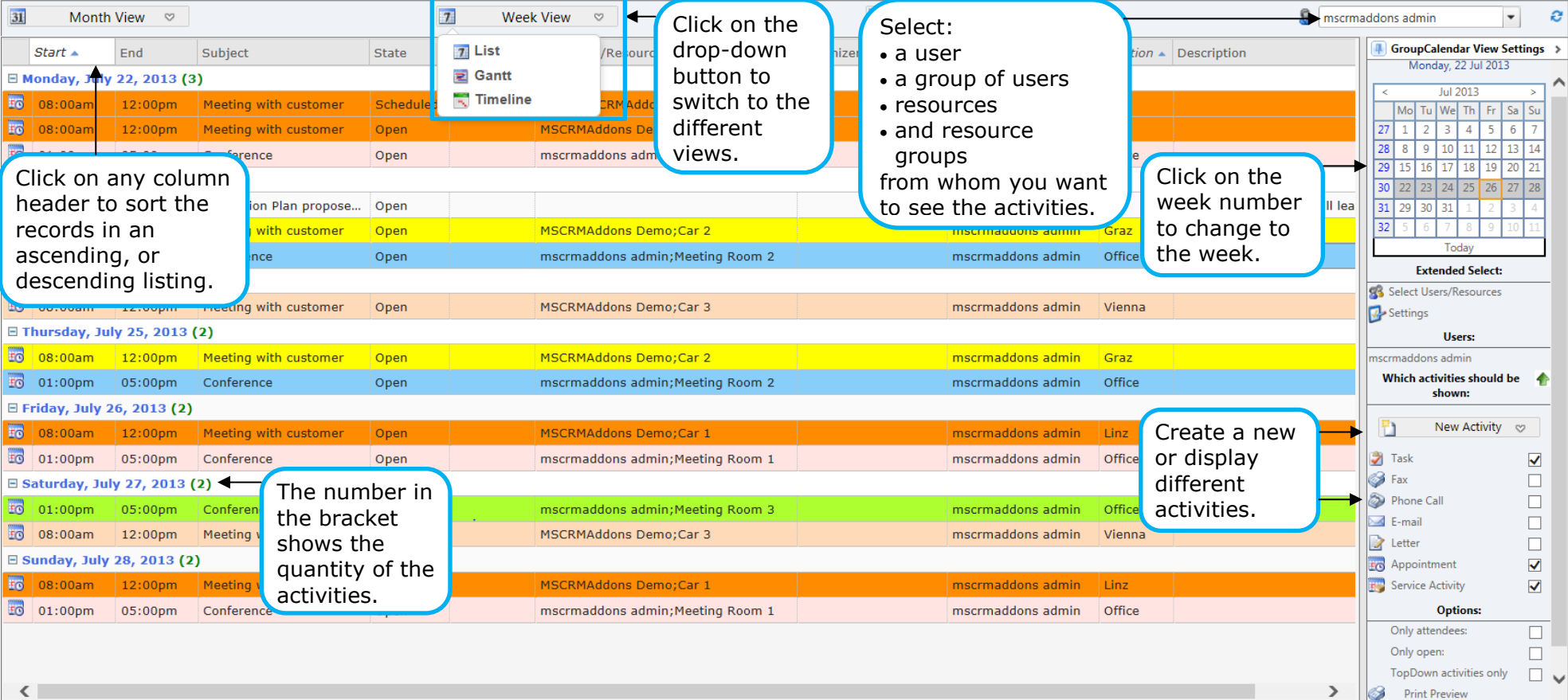
The screenshot shows the GroupCalendar interface in Month View for July 2013. The calendar grid displays various activities with different colors. Annotations provide instructions on how to interact with the interface:

- Click on the drop-down button to switch to the different views.** (Points to the view selector in the top left)
- Select:**
 - a user
 - a group of users
 - resources
 - and resource groups from whom you want to see the activities.
- Click on the arrow to move to the previous or next month.** (Points to the navigation arrows in the top right)
- Shows the calendar week** (Points to the week header in the top left)
- With a click on the day-number you can switch to the Day-View.** (Points to a day number in the calendar grid)
- With a click on the activity you can open the activity.** (Points to an activity bar in the calendar grid)
- Move the cursor on the activity to get detailed information:**
 - Activity-Type
 - Regarding
 - Attendees
 - Organizer
- Move the cursor to see later appointments** (Points to the scroll bar on the right side of the calendar grid)

The right sidebar shows the "GroupCalendar View Settings" panel, including a calendar navigation grid for July 2013, "Extended Select" options for users and resources, and a list of activity types with checkboxes for visibility and options.

6 Week View (List)

The Week-View shows all users' appointments and activities, listed chronologically and vertical at a glance, even when two appointments are scheduled at the same time. All the descriptions are also valid for Day View (List).



Click on any column header to sort the records in an ascending, or descending listing.

Click on the drop-down button to switch to the different views.

Select:

- a user
- a group of users
- resources
- and resource groups

from whom you want to see the activities.

Click on the week number to change to the week.

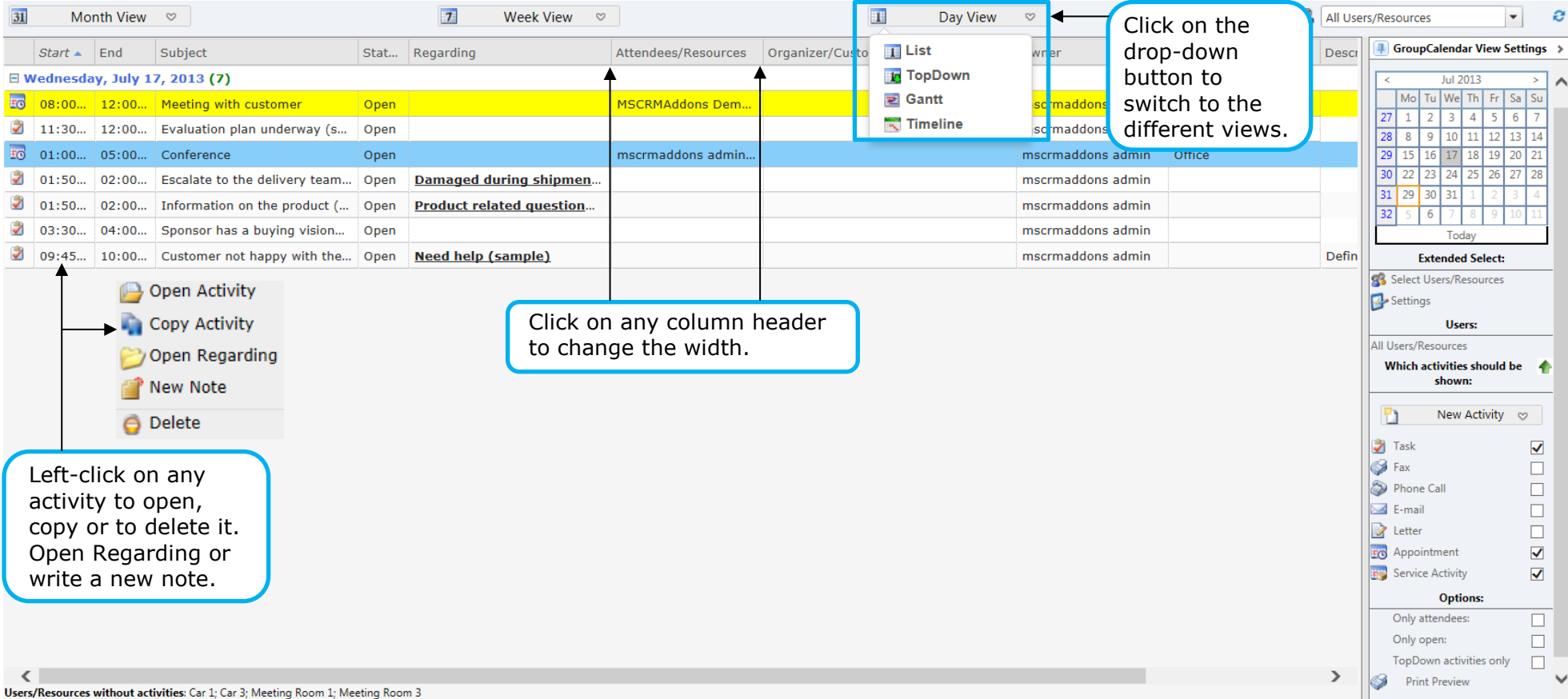
The number in the bracket shows the quantity of the activities.

Create a new or display different activities.

Start	End	Subject	State	Resource	Description
Monday, July 22, 2013 (3)					
08:00am	12:00pm	Meeting with customer	Schedule	MSCRMAddons Demo;Car 2	
08:00am	12:00pm	Meeting with customer	Open	MSCRMAddons Demo;Car 2	
		Conference	Open	mscrmaddons admin	
Thursday, July 25, 2013 (2)					
08:00am	12:00pm	Meeting with customer	Open	MSCRMAddons Demo;Car 2	
01:00pm	05:00pm	Conference	Open	mscrmaddons admin;Meeting Room 2	
Friday, July 26, 2013 (2)					
08:00am	12:00pm	Meeting with customer	Open	MSCRMAddons Demo;Car 1	
01:00pm	05:00pm	Conference	Open	mscrmaddons admin;Meeting Room 1	
Saturday, July 27, 2013 (2)					
01:00pm	05:00pm	Conference		mscrmaddons admin;Meeting Room 3	
08:00am	12:00pm	Meeting with customer		MSCRMAddons Demo;Car 3	
Sunday, July 28, 2013 (2)					
08:00am	12:00pm	Meeting with customer		MSCRMAddons Demo;Car 1	
01:00pm	05:00pm	Conference		mscrmaddons admin;Meeting Room 1	

7 Day View (List)

The Day-View show all activities and appointments within the specific time. Activities and appointments can simply be opened with a double-click. All the descriptions are also valid for Week View (List)

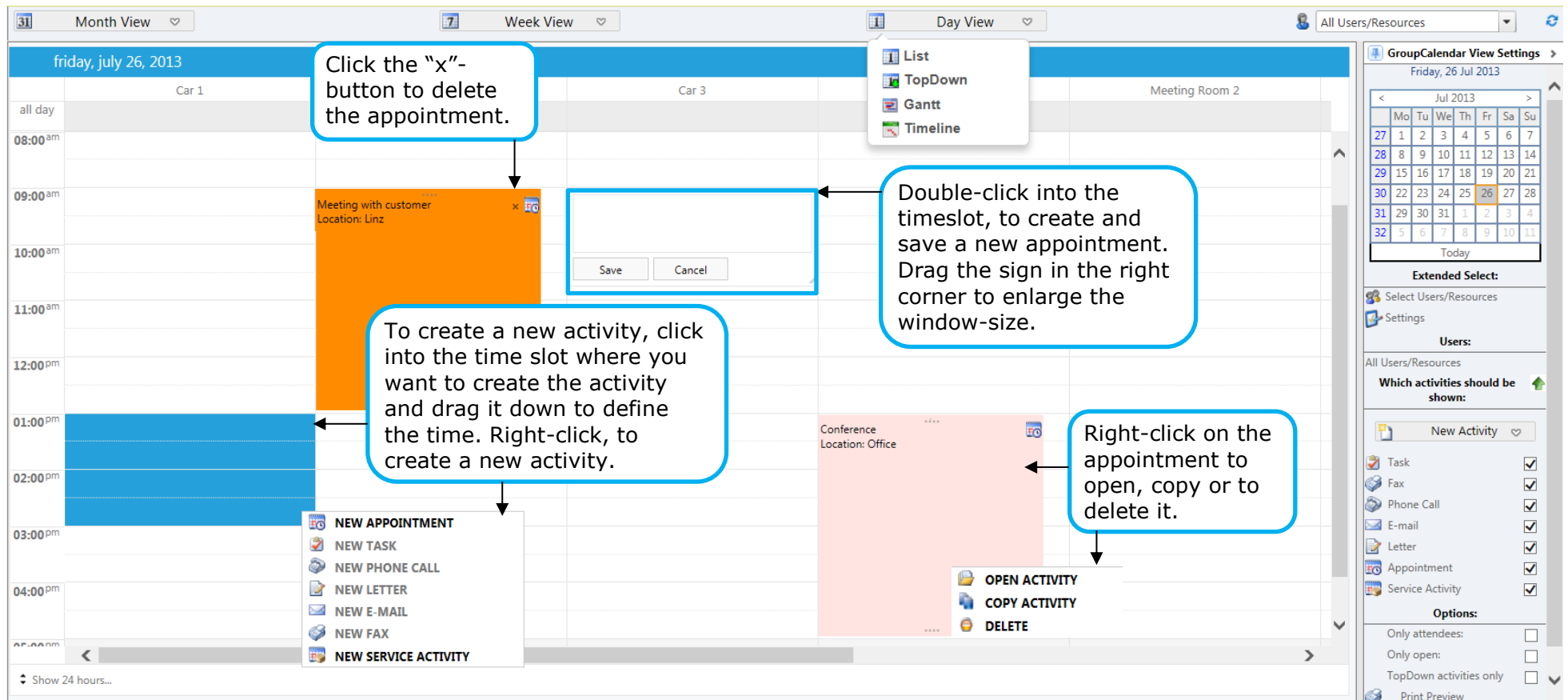


The screenshot displays the GroupCalendar interface in Day View (List) for Wednesday, July 17, 2013. The main table lists activities with columns for Start, End, Subject, Status, Regarding, Attendees/Resources, and Organizer/Customer. A context menu is open over the 'Day View' header, showing options: List, TopDown, Gantt, and Timeline. A callout box points to this menu with the text: "Click on the drop-down button to switch to the different views." Another callout box points to a column header with the text: "Click on any column header to change the width." A third callout box points to a context menu for an activity with the text: "Left-click on any activity to open, copy or to delete it. Open Regarding or write a new note." The context menu includes: Open Activity, Copy Activity, Open Regarding, New Note, and Delete. On the right, the 'GroupCalendar View Settings' panel is visible, showing a calendar grid for July 2013, 'Extended Select' options, and 'Options' for filtering activities.

Start	End	Subject	Stat...	Regarding	Attendees/Resources	Organizer/Custo
08:00...	12:00...	Meeting with customer	Open		MSCRMAddons Dem...	
11:30...	12:00...	Evaluation plan underway (s...	Open			
01:00...	05:00...	Conference	Open		mscrmaddons admin...	mscrmaddons admin Office
01:50...	02:00...	Escalate to the delivery team...	Open	Damaged during shipmen...		mscrmaddons admin
01:50...	02:00...	Information on the product (...)	Open	Product related question...		mscrmaddons admin
03:30...	04:00...	Sponsor has a buying vision...	Open			mscrmaddons admin
09:45...	10:00...	Customer not happy with the...	Open	Need help (sample)		mscrmaddons admin

8 TopDown View (Day View)

In TopDown View the activities are separated per user to get a plain view of the activities. You are able to change your activities by drag and drop. Just select your activity, and then you are able to drag it away and drop it down to a new chosen time and user. Change the user for your activities, by drag and drop. This View is currently just available in Day View.



The screenshot shows the GroupCalendar interface in Day View for Friday, July 26, 2013. The interface includes a navigation bar with 'Month View', 'Week View', and 'Day View' options. A dropdown menu is open showing 'List', 'TopDown', 'Gantt', and 'Timeline'. The main calendar area shows a grid with time slots from 08:00 am to 04:00 pm. An orange appointment titled 'Meeting with customer' is visible, with a callout box pointing to its top-right corner containing an 'x' button and a '36' icon. A 'Save' and 'Cancel' dialog box is open over the appointment. A blue appointment is also visible. A 'NEW APPOINTMENT' context menu is open at the bottom left, listing options like 'NEW TASK', 'NEW PHONE CALL', 'NEW LETTER', 'NEW E-MAIL', 'NEW FAX', and 'NEW SERVICE ACTIVITY'. A 'Conference' appointment is visible in the afternoon. A 'Right-click on the appointment to open, copy or to delete it.' callout points to a context menu with 'OPEN ACTIVITY', 'COPY ACTIVITY', and 'DELETE' options. On the right, the 'GroupCalendar View Settings' panel is visible, showing a calendar for July 2013 and various configuration options.

Click the "x"-button to delete the appointment.

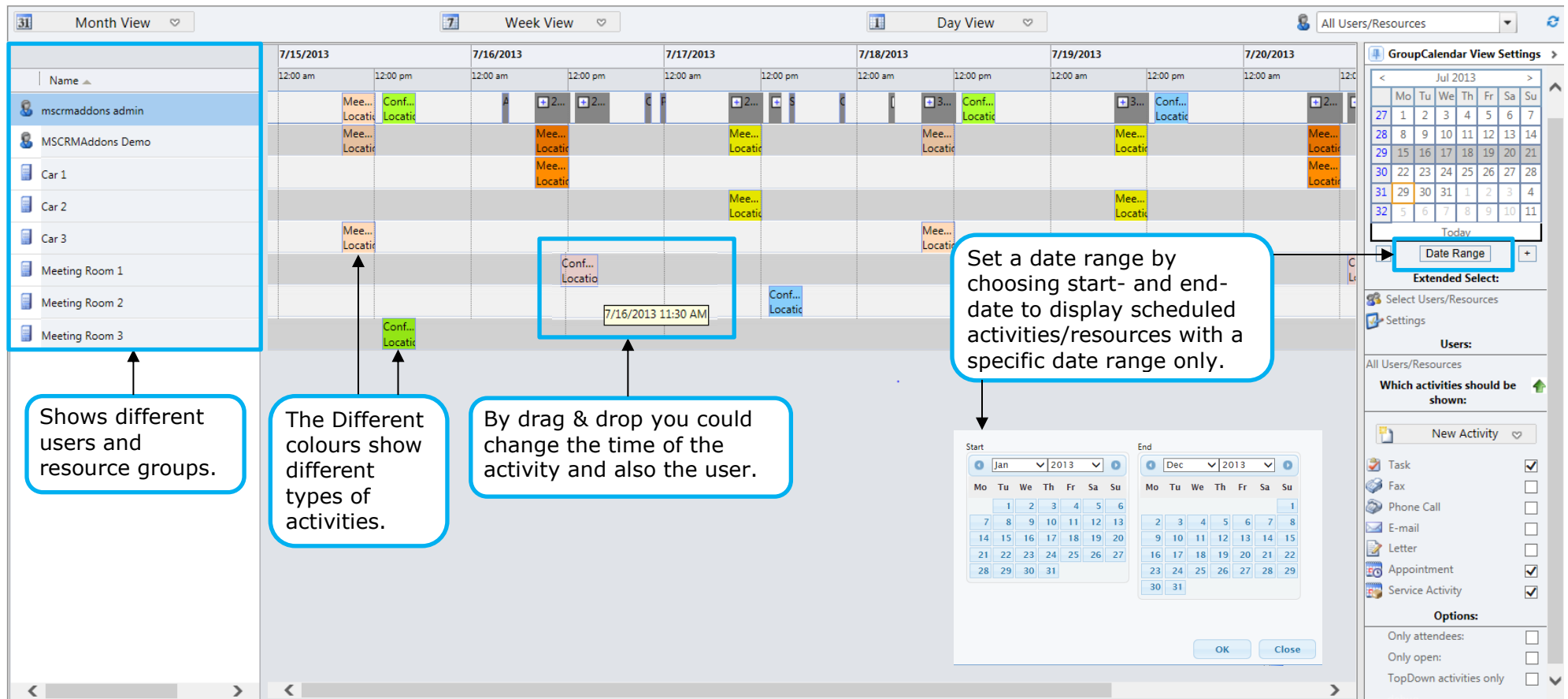
Double-click into the timeslot, to create and save a new appointment. Drag the sign in the right corner to enlarge the window-size.

To create a new activity, click into the time slot where you want to create the activity and drag it down to define the time. Right-click, to create a new activity.

Right-click on the appointment to open, copy or to delete it.

9 Gantt View

In the Gantt View, you have to click the plus-sign to see all appointments with the same date and time. All appointments and activities are displayed independent of their duration, meaning that longer appointments, activities are displayed with a longer bar and shorter with shorter ones. GroupCalendar Gantt View also provides the possibility to set a date range and a zoom functionality. You can switch within Month-, Week, and Day View to Gantt View.



The screenshot shows the GroupCalendar Gantt View interface. The main area displays a Gantt chart for the week of July 15-20, 2013. The chart is organized into columns for each day, with time slots from 12:00 am to 12:00 pm. Activities are represented by colored bars: orange for meetings and green for conferences. A callout box highlights a specific activity on 7/16/2013 at 11:30 AM, showing its details like 'Conf...' and 'Locatio'.

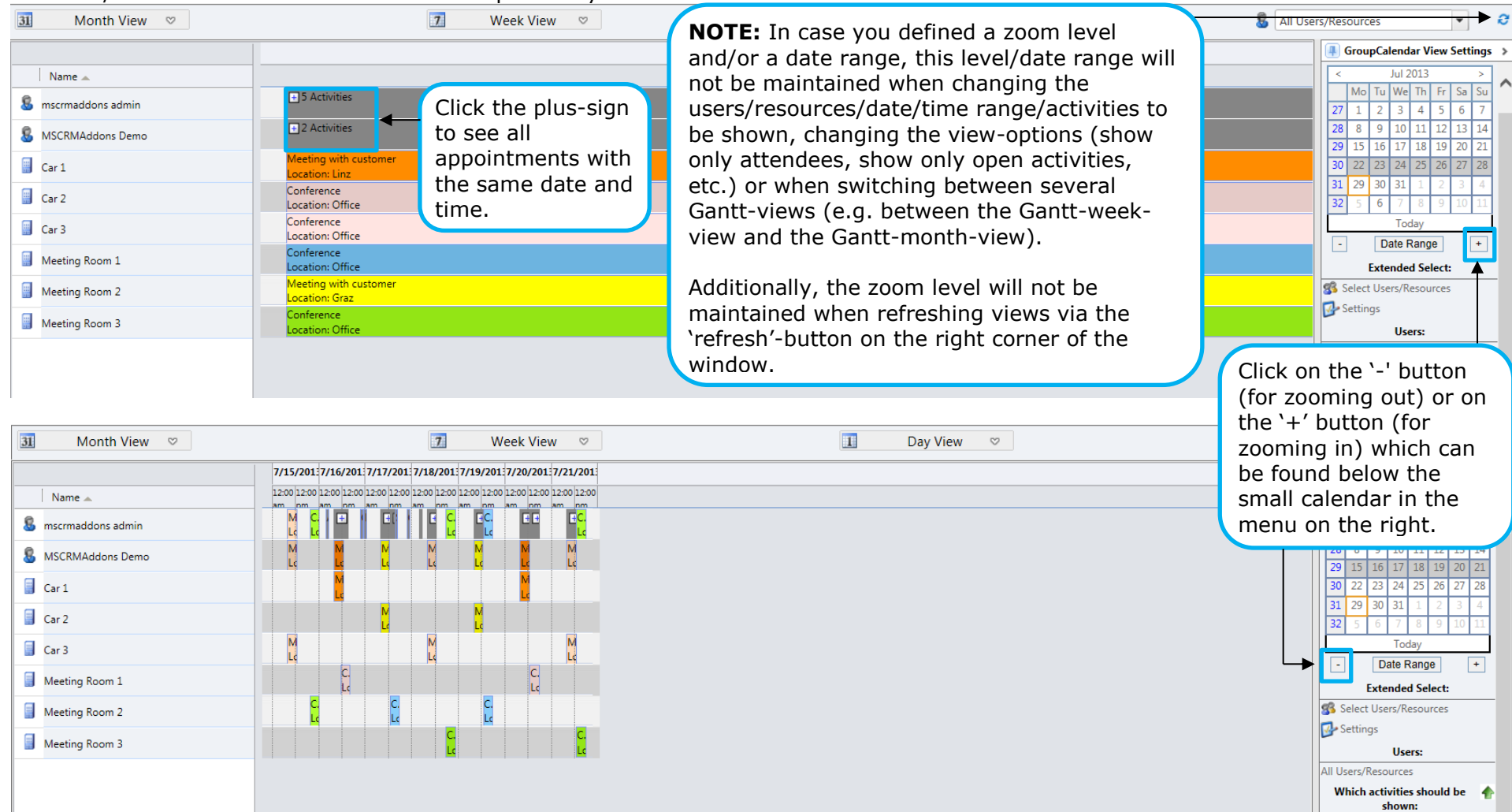
Callouts and annotations include:

- Shows different users and resource groups.** Points to the left-hand list of resources including 'mscrmaddons admin', 'MSCRMAddons Demo', and various cars and meeting rooms.
- The Different colours show different types of activities.** Points to the orange and green bars representing different activity types.
- By drag & drop you could change the time of the activity and also the user.** Points to a callout box for an activity on 7/16/2013 at 11:30 AM.
- Set a date range by choosing start- and end-date to display scheduled activities/resources with a specific date range only.** Points to a 'Date Range' dialog box that allows selecting a start date (Jan 2013) and an end date (Dec 2013).

On the right side, the 'GroupCalendar View Settings' panel is visible, showing options for 'Date Range', 'Extended Select', 'Users', and 'Which activities should be shown:'.

9.1 Gantt-View Zoom Functionality

This functionality enables users to zoom in and out the GroupCalendar's Gantt Views. This is very helpful if a user would like to see displayed activities/resources in more detail and more specifically.



NOTE: In case you defined a zoom level and/or a date range, this level/date range will not be maintained when changing the users/resources/date/time range/activities to be shown, changing the view-options (show only attendees, show only open activities, etc.) or when switching between several Gantt-views (e.g. between the Gantt-week-view and the Gantt-month-view).

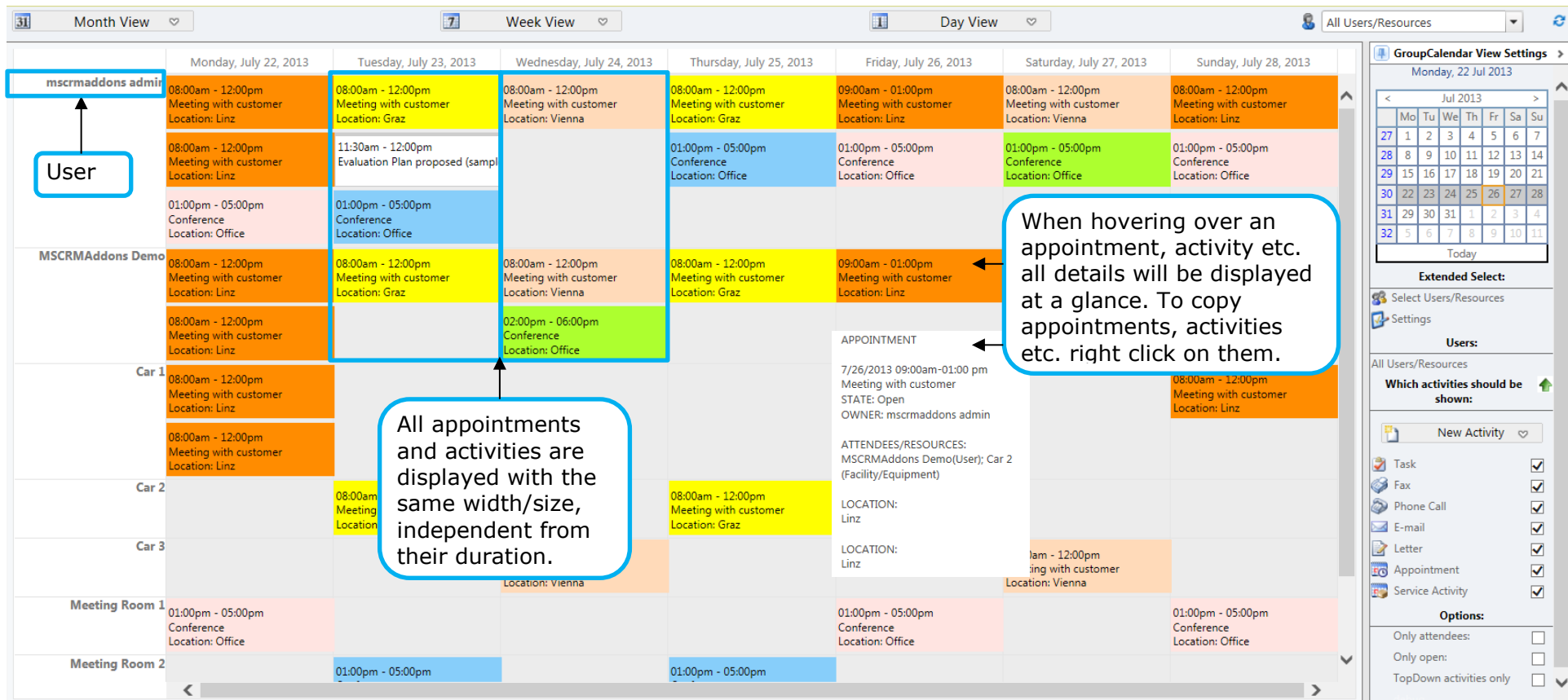
Additionally, the zoom level will not be maintained when refreshing views via the 'refresh'-button on the right corner of the window.

Click the plus-sign to see all appointments with the same date and time.

Click on the '-' button (for zooming out) or on the '+' button (for zooming in) which can be found below the small calendar in the menu on the right.

10 Timeline View

The Timeline-View gives you a detailed overview of all your appointments. In Timeline-View, you can see all users' appointments and activities, listed chronologically and vertical at a glance, even when two appointments are scheduled at the same time. All the descriptions are also valid for the other Timeline Views.



The screenshot displays the GroupCalendar Timeline View for the week of July 22-28, 2013. The interface includes navigation tabs for Month View, Week View (selected), and Day View. A dropdown menu shows 'All Users/Resources'. The main area is a grid where rows represent users/resources and columns represent days. Appointments are shown as colored blocks with text labels such as 'Meeting with customer', 'Conference', and 'Evaluation Plan proposed'. A callout box points to a 'User' label, and another points to a specific appointment block, stating: 'When hovering over an appointment, activity etc. all details will be displayed at a glance. To copy appointments, activities etc. right click on them.' A third callout box points to the width of appointment blocks, stating: 'All appointments and activities are displayed with the same width/size, independent from their duration.' On the right, the 'GroupCalendar View Settings' panel is visible, showing a calendar for July 2013 and options for 'Extended Select', 'Users', 'Which activities should be shown', and 'Options'.

11 Contact

If you have questions to the product send an Email to
support@mscrm-addons.com
or visit our blog
<http://blogs.mscrm-addons.com>

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