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for Microsoft Dynamics CRM

GroupCalendar UserGuide for MS CRM 2015/2016 and Dynamics 365

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GroupCalendar

(How to work with GroupCalendar for MS CRM 2015/2016 and Dynamics 365)

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Preamble

This documentation is intended to guide you through the usage of GroupCalendar in Microsoft Dynamics CRM. This guide applies to version 2015.109 or higher.

Please read this document carefully and follow the steps as described to achieve the described results.

Target Audience

This guide is intended for users applying scheduling with GroupCalendar who have the following minimum skills:

- Basic Microsoft Dynamics CRM Knowledge
- Maintaining and configuring a Microsoft CRM Organization

Supported Web Browsers and versions

Supported Web Browsers:

- Internet Explorer 10 and higher
- Chrome
- Edge
- Firefox

One of the following versions of Microsoft Dynamics CRM must be available:

- Microsoft Dynamics CRM Server 2015/2016 and Dynamics 365
- Microsoft Dynamics CRM Online

Purpose of GroupCalendar?

GroupCalendar facilitates – among other things – scheduling in Microsoft Dynamics CRM. More than six different views allow you to schedule users, teams, resources and/or facilities in no time.

Thus, GroupCalendar provides powerful scheduling options.

Because of its elaborated functionalities, GroupCalendar is the perfect scheduling tool:

- (Re-) schedule service activities/appointments via drag and drop
- Working hours Integration
- Color-Coding to keep a compact overview
- Printing option for views
- More than six different views for users, teams and/or resources
- Definition of teams, and resource groups
- Advanced Find

For further information on GroupCalendar, please also watch our YouTube video on how to [schedule easily in Microsoft Dynamics CRM](#).

1 GroupCalendar Basics

GroupCalendar for Microsoft Dynamics CRM (GC) is designed to provide a comprehensive view of all activities associated with

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

With GC, users can view the calendars of a single user or of several users at once. So, they can check for scheduling conflicts of activities or resources.

Group Calendar offers the possibility to view these activities in a day- **1**, week **2** – or month **3** -view. Furthermore, you can select within these views between Overview-, Gantt-, or Timeline-, TopDown-, or Agenda-View with a simple click on the drop-down arrow of your choice.

In the course of the following chapters, we will provide you with an overview of the GroupCalendar surface and its views. For further information on the GroupCalendar views, please have a look at [CHAPTER 2 ON PAGE 16](#).

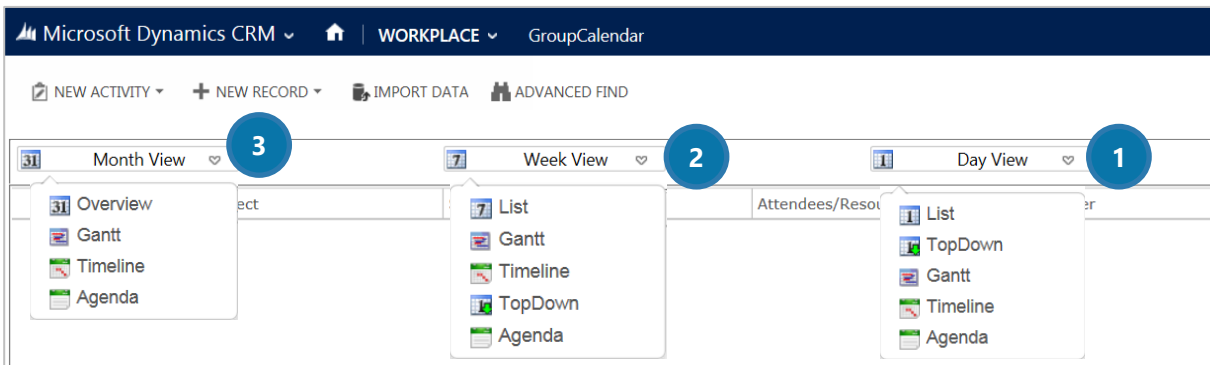


Figure 1: GroupCalendar view overview

1.1 How to access GroupCalendar

To access GroupCalendar, open *Workplace* > *MyWork* > *GroupCalendar* in the CRM-menu.

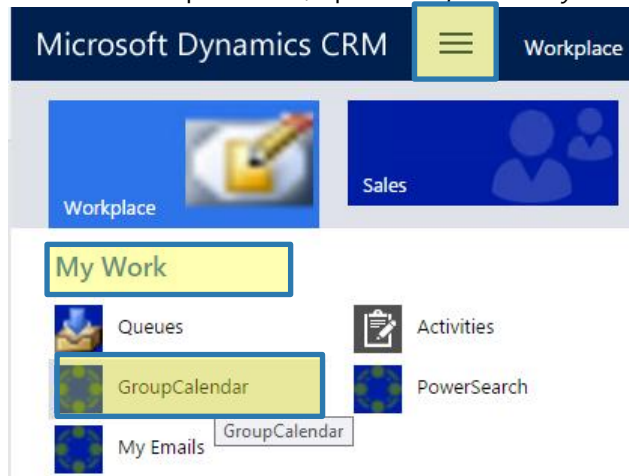


Figure 2: GroupCalendar access

Then, GroupCalendar opens.

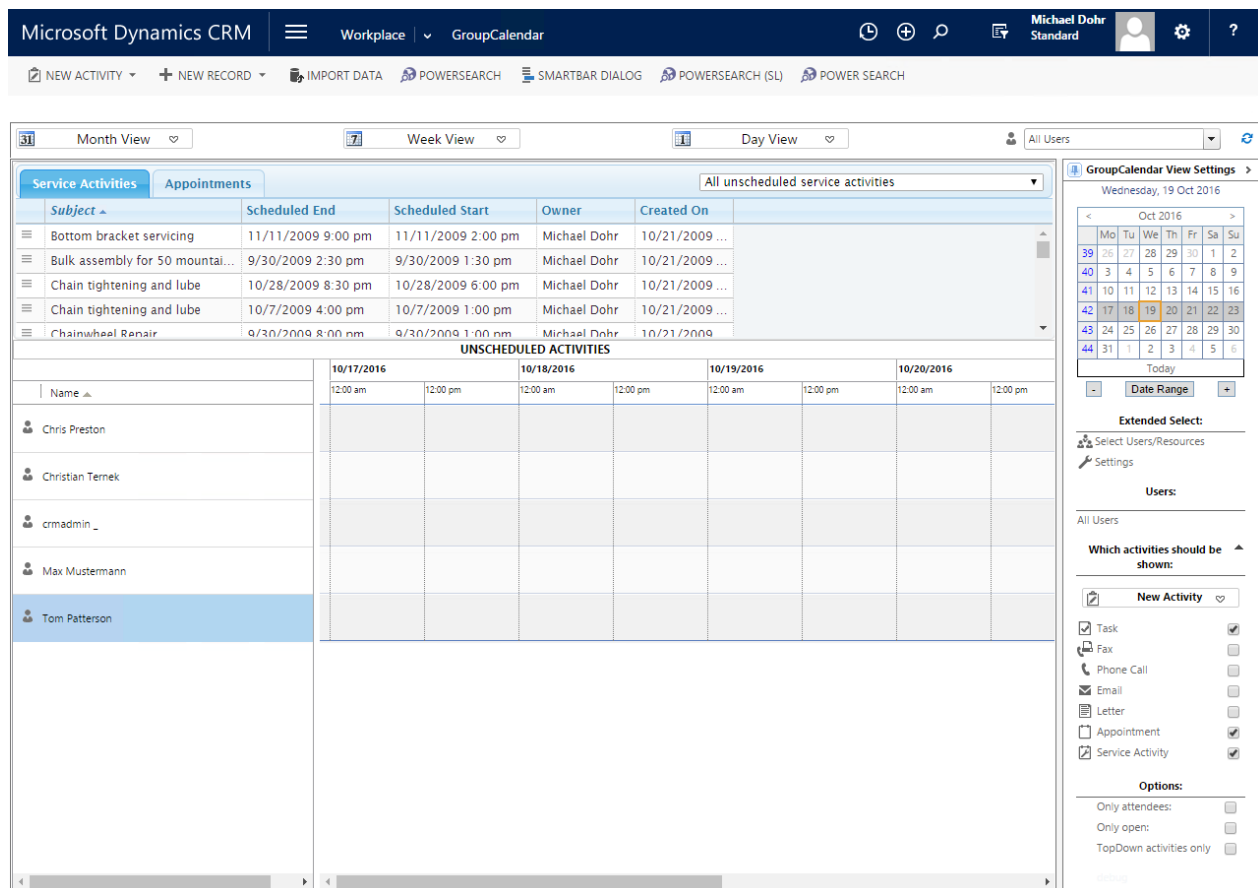


Figure 3: GroupCalendar example

1.2 GroupCalendar surface

The surface of GroupCalendar allows you to get an overview of each team and/or single user and resource. The side bar allows you to schedule activities fast and easy. This chapter provides you with a quick overview.

The screenshot displays the Microsoft Dynamics CRM GroupCalendar interface. At the top, the navigation bar includes 'Microsoft Dynamics CRM', 'Workplace', and 'GroupCalendar'. Below this, a search bar and user profile 'Michael Dohr Standard' are visible. The main interface is divided into several sections:

- Service Activities / Appointments:** A table listing activities with columns for Subject, Start Time, End Time, Duration, Created By, and Owner. Callout 4 points to the 'Appointments' tab.
- View Controls:** Buttons for 'Month View', 'Week View', and 'Day View'. Callout 1 points to the 'List' view selection menu.
- Filtering:** A dropdown menu for 'All unscheduled appointments'. Callout 5 points to this filter.
- Calendar Grid:** A grid showing activities for users (Chris Preston, Christian Ternek, crmadmin_, Max Mustermann, Tom Patterson) across dates 10/18/2010 to 10/21/2010. Callout 6 points to the user list on the left.
- Appointment Detail:** A pop-up window showing details for an appointment on 10/18/2010 at 09:00am-06:15 pm, including attendees (Max Mustermann, Ann Beebe) and organizer (Max Mustermann). Callout 8 points to this detail view.
- GroupCalendar View Settings:** A sidebar on the right with options for 'Extended Select', 'Users', 'Which activities should be shown', and 'New Activity' (Task, Fax, Phone Call, Email, Letter, Appointment, Service Activity). Callout 3 points to the calendar grid in this settings panel.

Figure 4: GroupCalendar Overview

1 THE VIEW-SELECTION

In this bar, you can change between the day-, week- or month-view of GroupCalendar. Furthermore, a click on the drop-down arrow enables you to select which kind of view you would like to open. For further information on the GroupCalendar views. Learn more in [CHAPTER 2](#).

2 THE GROUP-SELECTION

Within this selection, you can choose between a certain user, a group of users, the resources you would like to schedule and the resource groups in order to see their activities. Next to the selection, you will find a **[Refresh]**-button. Clicking on it allows you to refresh GroupCalendar.

3 THE GROUPCALENDAR SIDEBAR

Open or close the SideBar with a click on the small arrow at the right side (next to the heading *GroupCalendar View Settings*). Click on the small **[Pin/Un-Pin]**-button at the left side in the same row to fix or unfix the menu. The calendar allows you to switch between dates really fast – the usage is similar to a conventional date-picker. For further information on this topic, have a look at [CHAPTER 1.2.1 THE SIDEBAR ON PAGE 9](#).

4 THE UNSCHEDULED ACTIVITIES SECTION

Within this section, you get an overview of all your unscheduled service activities and appointments.



The unscheduled activity section is GANTT specific only. For further information on this topic, have a look at [CHAPTER 2.6.1 THE UNSCHEDULED ACTIVITIES-VIEW ON PAGE 28](#).

5 THE UNSCHEDULED ACTIVITIES DROP-DOWN MENU

Using this Drop-Down-menu enables you to switch between *All unscheduled activities* and *My unscheduled activities*.



The unscheduled activities drop down menu is GANTT specific only. For further information on this topic, have a look at [CHAPTER 2.6.1 THE UNSCHEDULED ACTIVITIES-VIEW ON PAGE 28](#).

6 GROUP CALENDAR USER MENU

This section provides you with an overview of all selected users.



The GroupCalendar user menu is GANTT specific only. For further information on this topic, have a look at [CHAPTER 2.6 THE GANTT VIEW ON PAGE 26](#).

7 THE GROUPCALENDAR SURFACE

This surface provides you with an overview of all selected activities. You can define a specific color for each scheduled activity or simply use the standard ones. For further information on Color Coding, please have a look at our [GroupCalendar Install Guide in our Download section](#) or contact your administrator.

Anyway, with a right-click on an appointment, you can copy or delete the appointment. To change the content, simply double click on the appointment.

8 DETAILED ACTIVITY INFORMATION

Simply move the mouse cursor over an activity to get detailed information on it.

1.2.1 The SideBar

No matter which view you select, the SideBar stays the same. It facilitates the handling of GroupCalendar, as well as the creation of new activities.

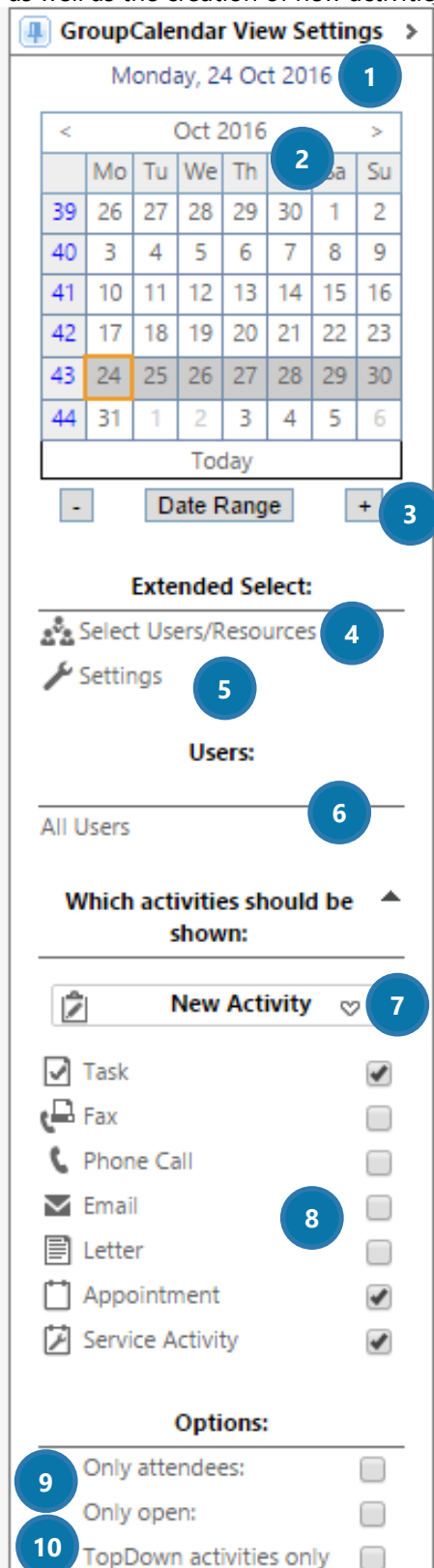


Figure 5: GroupCalendar SideBar

1 THE DATE

Shows the selected date.

2 THE CALENDAR

The calendar basically works like a typical data picker. You can select a month and/or a year with a click on the arrow on the top. Clicking on the week number at the left side automatically opens the week view of that week. By clicking on a certain day, you can select that day. With a click on the **[Today]**-button, the calendar automatically brings you back to today's date.

3 THE **[DATE RANGE]**-BUTTON



This is a feature of GANTT view only. For further information on GANTT view, please have a look at [CHAPTER 2.6 THE GANTT VIEW ON PAGE 26](#).

This button allows you to extend or reduce the number of days displayed at the left side in the GroupCalendar overview. Click on the **[Plus]**-button to zoom the view in. Click on the **[Minus]**-button to zoom it out.

4 SELECT USERS/RESOURCES

Click this button in order to receive a kind of advanced selection of specific users instead of single users or groups. This functionality is helpful, if you want to get an overview of the activities of many different users at the same time.

5 SETTINGS

A click on the **[Settings]**-button opens the GroupCalendar settings. Users can modify settings like the visibility or width of columns here. For further information on this topic, have a look at [CHAPTER 1.2.2 THE DEFAULT SETTINGS ON PAGE 12](#).

6 USERS

Shows you the currently selected user(s). The following categories can be displayed here:

- a single user
- a group of users (or a team)
- a single resource
- a resource group
- multiple users from advanced user select

7 THE **[NEW ACTIVITY]**-BUTTON

Click on this button to define new activities and a date for your activity. The current date is prefilled.

8 THE ACTIVITY OVERVIEW

The checkboxes next to the activities allow users to select which activity type should be displayed at the moment. You can also configure some activities that should be checked by default in the settings. For further information on this topic, have a look at [CHAPTER 1.2.2 THE DEFAULT SETTINGS ON PAGE 12](#).

9 ONLY ATTENDEES/ONLY OPEN

Filter activities, where the selected users are only attendees AND/OR filter only activities that are opened.

10 TOPDOWN ACTIVITIES ONLY

Hide all users that show no activities on the selected date.

1.2.2 The default settings

In the GroupCalendar settings, users can configure the Look & Feel of GroupCalendar.

Basically, the following points can be defined in the settings:

- Default view when opening GroupCalendar
- Default user/group selection when opening GroupCalendar
- Column width/height/order/visibility
- Default SideBar filter criteria

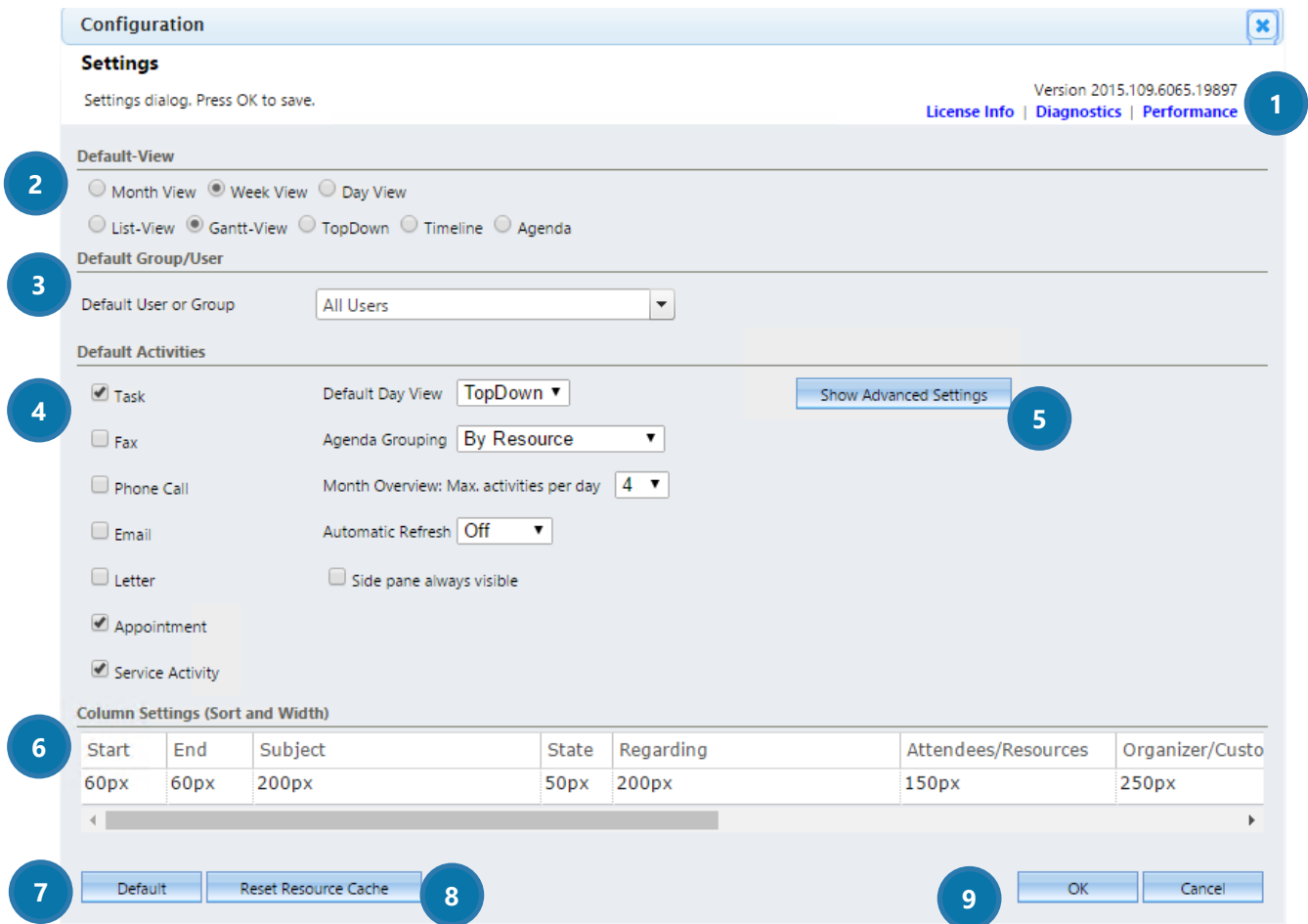


Figure 6: GroupCalendar SideBar

1 LICENSE INFO

In the right upper corner you find the license information and the GroupCalendar version number.

2 DEFAULT-VIEW

Check the view you want to be displayed as default view in GroupCalendar here.

3 DEFAULT GROUP/USER

Select the default user/group you want to be displayed in GroupCalendar here by using the drop-down menu.

4 DEFAULT ACTIVITIES

Define which activities should be displayed per default by checking the ones you want to be displayed. You can also select the *Default Day View* to be displayed (List, TopDown, Gantt, Timeline, Agenda). Besides that, the *Agenda Grouping* can be modified.

The *Month Overview: Max. activities per day* allows you to define how many activities per day can be set. Set *Automatic Refresh* to ON if you want the GroupCalendar activities to be refreshed automatically. Check the *SidePane always visible*-checkbox if you want the SideBar to be always visible.

5 THE ADVANCED SETTINGS

With a click on this button the following settings can be defined. Check the box next to the settings if you want the functionality to be applied to GroupCalendar. Do not check the box if you do not want the functionality to be applied to GroupCalendar.



A screenshot of the 'Advanced Settings' panel in GroupCalendar. It contains seven checkboxes with the following labels: 'Only attendees', 'TopDown view shows users with activities only', 'Only open', 'Show Attendees/Regarding (takes more time)', 'Do not show workflow generated activities', 'Show month end in gantt/timeline', and 'Apply current date range to filter unscheduled activities'. The 'Show Attendees/Regarding (takes more time)' checkbox is checked, while all other checkboxes are unchecked.

Figure 7: GroupCalendar Advanced Settings

6 COLUMN SETTINGS (SORT & WIDTH)

To change the position of the columns, simply grab a column and drop it at the desired position. The slot where a column can be dropped will be highlighted when dragging over it.

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

You can also double-click a column and enter your preferred width (in pixels). If you click on the header of the grid, alphabetic sorting can be set. Press Shift and click at several entities at the same time in order to configure multiple assorting.

7 THE **[DEFAULT]**-BUTTON

Click on the **[Default]**-button in order to setback to the default settings.

8 THE **[RESET RESOURCE CACHE]**-BUTTON

Click on the **[Reset Resource Cache]**-button in order to reset the resource cache.

9 THE **[OK]**-BUTTON & THE **[CANCEL]**-BUTTON

Click on the **[OK]**-button if you want to save your changes before you proceed. Click on the **[Cancel]**-button if you do not want your changes to be saved.

2 The GroupCalendar Views

GroupCalendar offers more than six different views that allow you to schedule users, teams, resources and/or facilities in no time.

To access the different views, simply open GroupCalendar and select your desired view. For more information on how to access GroupCalendar, have a look at chapter [1.1 HOW TO ACCESS GROUPCALENDAR, PAGE 5](#). Within the following chapters, you will get a detailed description of each view.

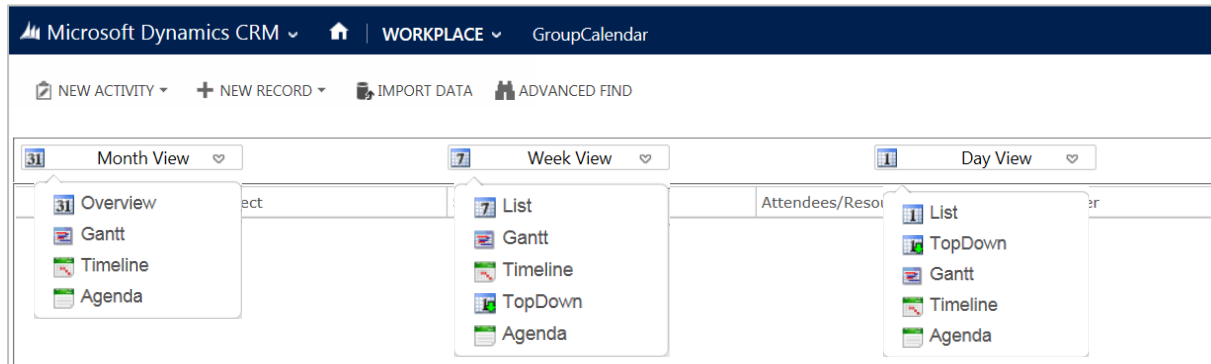


Figure 8: GroupCalendar view overview

2.1 The Month View (Overview)

To access the Month view, simply click on *Month view > Overview* 1 (or select any other view that is displayed in the drop-down menu). The *Month View* provides you with all activities that are scheduled for that particular month. Click on the drop-down button to switch to the different views.

The screenshot displays the Microsoft Dynamics CRM GroupCalendar interface. The top navigation bar shows 'Microsoft Dynamics CRM', 'Workplace', and 'GroupCalendar'. The left sidebar contains view options: Overview (selected), Gantt, Timeline, and Agenda. The main calendar grid shows the month of October 2010, with activities scheduled for various days. The right sidebar contains 'GroupCalendar View Settings' and 'Extended Select' options. A detailed view of an appointment is shown in a popup window, listing details such as 'APPOINTMENT', '07:00am-09:00am Breakfast', 'STATE: Scheduled', 'OWNER: Michael Dohr', 'ATTENDEES/RESOURCES: Max Mustermann (User); Chris Preston (User); Christian Ternek (User)', 'ORGANIZER/CUSTOMER: Michael Dohr', and 'LOCATION: Prag'.

Figure 9: GroupCalendar – Month View (Overview)

2 THE GROUP SELECTION

Here, you can select, which activities you would like to see. You can select between

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

3 THE DATE PICKER

Click on the arrow to move to the previous or the next month.

4 CREATE A NEW ACTIVITY

Double-click on a random date to create a new activity. Insert the details and click on the **[Save]**-button.

5 SWITCH TO THE DAY VIEW

With a click on the date number, you automatically switch to the day view. This functionality is helpful, if you want to have a look at later appointments. You can also configure a standard day view – Grid, TopDown, GANTT etc. For further information on this topic, have a look at [CHAPTER 1.2.2 THE DEFAULT SETTINGS ON PAGE 12](#).

6 DELETE AN ACTIVITY

Click on the 'X' in order to delete an activity. Before the activity is finally deleted, you will be asked a second time.

7 SEE LATER ACTIVITIES

Click on the **[more...]**-button to see later appointments. In the Settings, users can set their preferred Day View. For more information on the Settings, have a look at [1.2.2 THE DEFAULT SETTINGS ON PAGE 12](#).

8 HOW TO MODIFY ACTIVITIES

Activities can be simply rescheduled via drag & drop. With a click on the activity, you can open the activity. Double-click on a date to create a new activity.

9 HOW TO GET DETAILED INFORMATION

Simply move the cursor over a random activity to get detailed information about the *Activity Type*, the *Regarding*, the *Attendees* and the *Organizer* of the activity.

2.2 The Week View (List)

To access the Week View, simply click on *Week View* > *List* **1** (or select any other view that is displayed in the drop-down menu). The *Week View* displays all users' appointments and activities, listed chronologically, as well as vertically. Most of the descriptions are also valid for the List View in the Day View.

The screenshot shows the Microsoft Dynamics CRM GroupCalendar interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'Workplace', and 'GroupCalendar'. A search bar and user profile 'Michael Dohr Standard' are also visible. Below the navigation bar, there are several toolbars for 'NEW ACTIVITY', 'NEW RECORD', 'IMPORT DATA', 'POWERSEARCH', 'SMARTBAR DIALOG', and 'POWER SEARCH'. The main area displays a calendar grid with a 'Week View' dropdown menu open, showing options: 'List', 'Gantt', 'Timeline', 'TopDown', and 'Agenda'. The 'List' option is selected. The calendar shows appointments for Monday, October 18, 2010, and Tuesday, October 19, 2010. The appointments are listed in a table format with columns for Start, End, Subject, State, Regarding, Organizer/Customer, Owner, Location, and Description. A 'GroupCalendar View Settings' panel is open on the right, showing a calendar grid for October 2010 and various settings for 'Extended Select', 'Users', and 'Which activities should be shown'. Numbered callouts 1 through 5 highlight specific elements: 1 points to the 'List' menu item, 2 points to the 'Subject' column header, 3 points to the date 'Tuesday, October 19, 2010', 4 points to the 'All Users' dropdown, and 5 points to the calendar grid in the settings panel.

Start	End	Subject	State	Regarding	Organizer/Customer	Owner	Location	Description
Monday, October 18, 2010 (5)								
07:00...	09:00...	Breakfast	Sche...			Michael Dohr	Prag	
09:00...	06:15...	CEE Partner Day	Sche...			Max Mustermann		
12:10...	02:10...	Meeting	Sche...			Chris Preston	Room 123	
06:00...	09:00...	Reception & Expo	Sche...		Christian Ternek	Christian Ternek		
07:35...	08:35...	Vision Keynote	Sche...			Max Mustermann		
Tuesday, October 19, 2010 (5)								
07:00...	09:00...	Breakfast	Sche...		Max Mustermann;Ch...	Michael Dohr	Prag	
10:30...	11:30...	General Sessions	Sche...		Max Mustermann	Michael Dohr		
10:30...	12:00...	Go to grocery store	Open			Tom Patterson		
02:30...	04:00...	Hands-on labs	Sche...			Tom Patterson		
09:15...	10:30...	Keynote	Sche...		Chris Preston	Michael Dohr		
Wednesday, October 20, 2010 (1)								
07:00...	09:00...	Breakfast	Sche...		Max Mustermann;Ch...	Michael Dohr	Prag	
Thursday, October 21, 2010 (2)								
07:00...	09:00...	Breakfast	Sche...		Max Mustermann;Ch...	Michael Dohr	Prag	
11:35...	01:05...	Lunch	Sche...			Chris Preston		
Friday, October 22, 2010 (1)								
07:00...	09:00...	Breakfast	Sche...		Max Mustermann;Ch...	Michael Dohr	Prag	

Figure 10: GroupCalendar – Week View (List)

2 SORT ACTIVITIES

Click on any column header to sort the records in an ascending or a descending order.

3 NUMBER OF ACTIVITIES

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

4 THE GROUP SELECTION

Here, you can select, which activities you would like to see. You can select between

- a single user
- a group of users
- a single resource

and resource groups

5 CHANGE WEEKS

Click on the week number to change to the week.

2.3 The Day View (List)

To access the *Day View*, simply click on *Day View > List* **1** (or select any other view that is displayed in the drop-down menu). The Day View shows all activities and appointments with the specific time. Activities can be opened with a simple double-click. Most of the descriptions are also valid for the List View in the Week View.

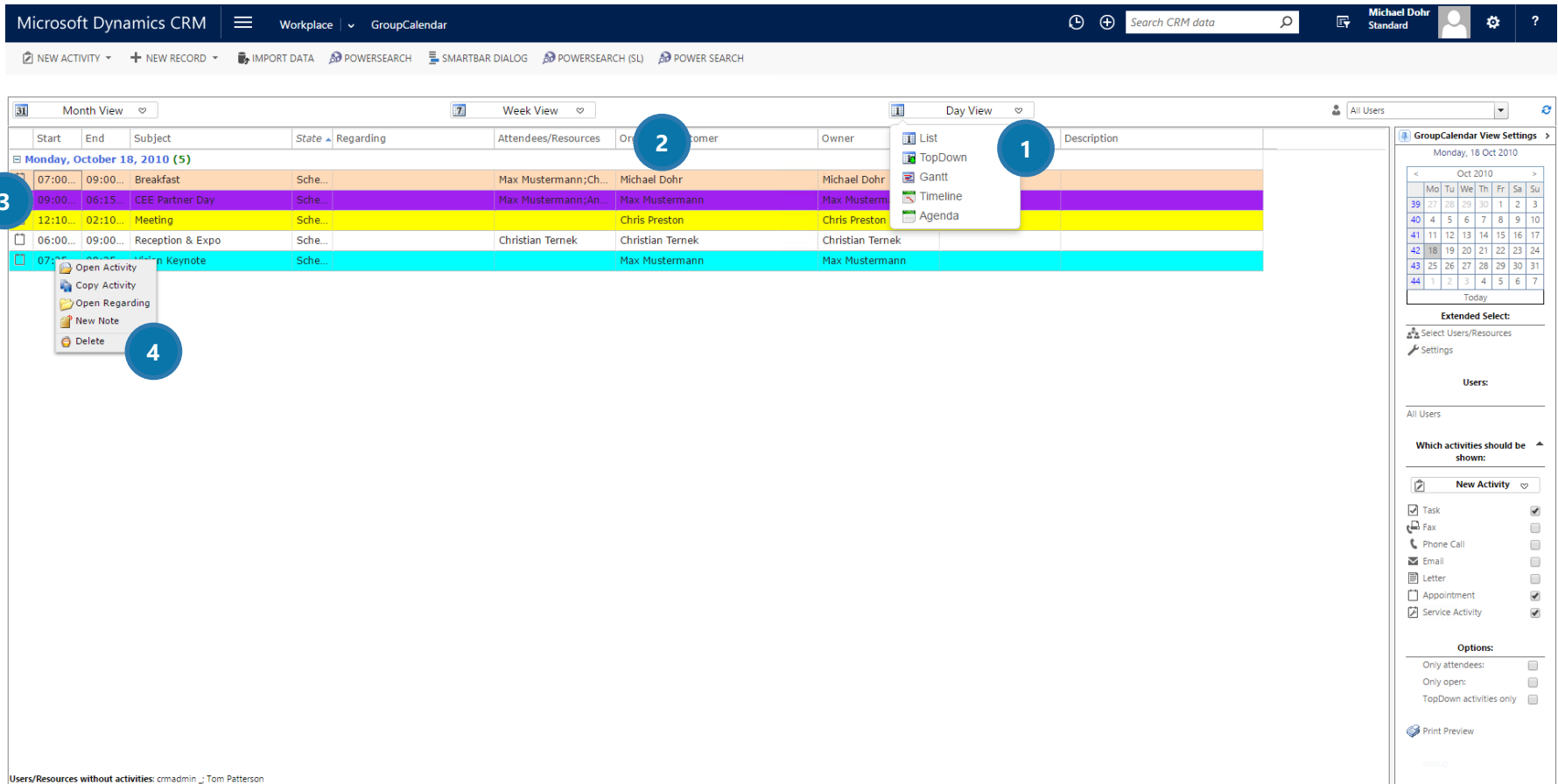


Figure 11: GroupCalendar – Day View (List)

② MODIFY COLUMN WIDTH

Click on the line between any column headers and drag it to the left or the right in order to modify the column width.

③ COLOR CODING

The different activities can be displayed in different colors.

④ MODIFY ACTIVITIES

If you right-click on an activity, you can open, copy or delete the activity. But you can as well

- open the regarding
- or create a new note

2.4 The TopDown View (Day View)

In the TopDown View, the activities are separated per user and resources/facilities. The activities are basically the star of this view. Users, resources and/or facilities are displayed in different colours. You may change your activities by drag and drop. To do so, simply select your activity, and drag and drop it to a different time and/or user.

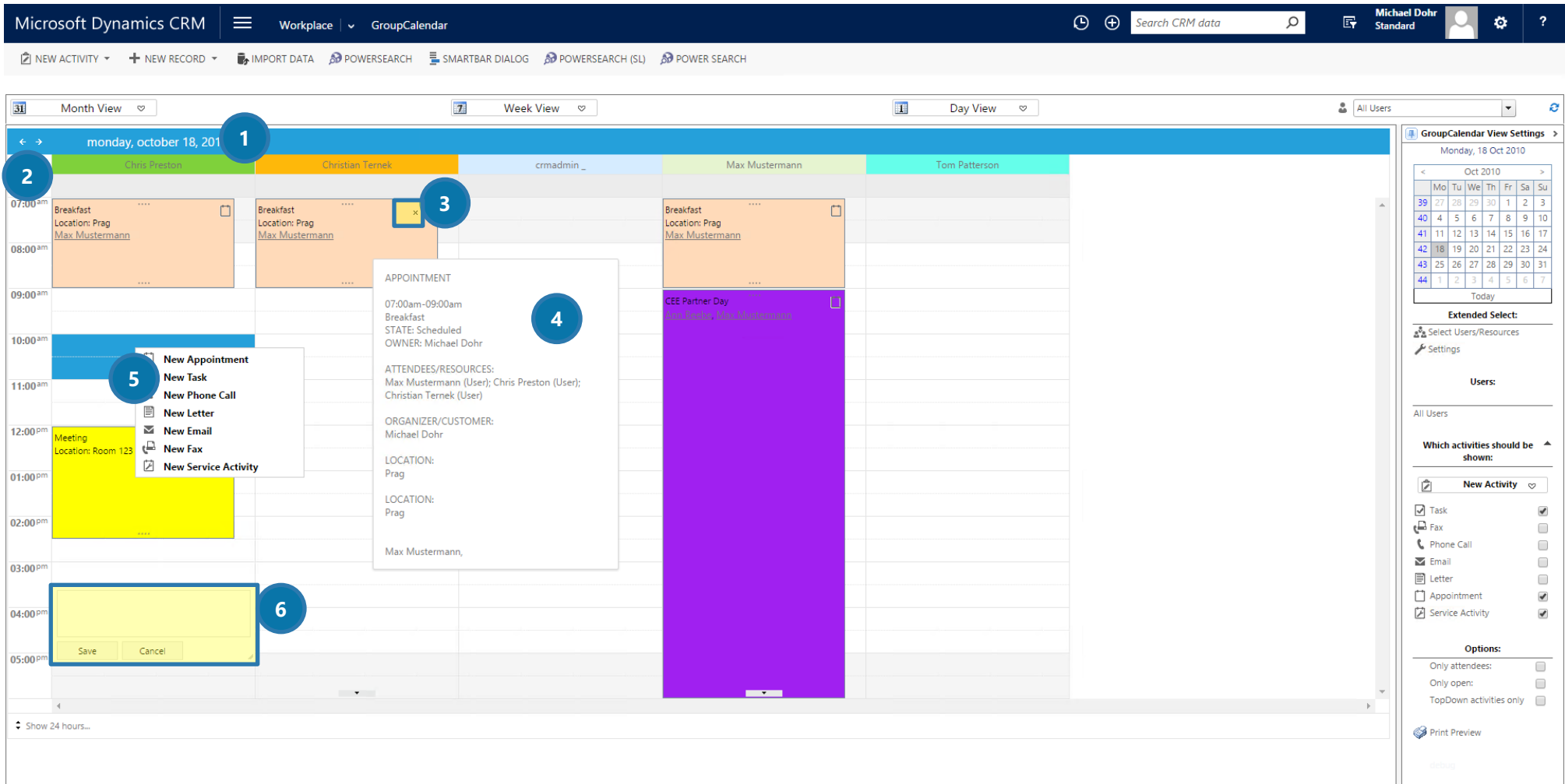


Figure 12: GroupCalendar – TopDown View (Day View)

1 VIEW HEADER

In the view header, all users, resources and/or facilities are displayed in different colors. These colors are automatically applied by GroupCalendar.

2 MOVE FROM DAY TO DAY

Click on the arrow to move to the next or to the previous day.

3 DELETE ACTIVITIES

Click on the 'X' in order to delete an activity.

4 HOW TO GET DETAILED INFORMATION

Simply move the cursor over a random activity to get detailed information about

- the *Activity Type*,
- the *Regarding*,
- the *Attendees* and
- the *Organizer*

of the activity.

5 CREATE A NEW ACTIVITY

To create a new activity, right click into the time-slot in which you want to create the activity. The time-slot is now highlighted in blue. Simply click on the activity you would like to create now. You could also select more than one time slot and do a right click in order to open a new activity.

6 CREATE A NEW ACTIVITY – SHORTCUT

Another way to create an activity, is to double-click into a certain time-slot. You can then insert all the relevant data for the activity. As soon as you have finished, simply click on the **[Save]**-button. If you decide not to create a new activity, simply click on the **[Cancel]**-button.

2.5 The TopDown View (Week View)

The TopDown View displays all users, facilities and resources in the header. Users, facilities and resources are shown in different colors to provide a clear overview. All related activities are displayed in our traditional color-coding way.

The screenshot shows the Microsoft Dynamics CRM GroupCalendar interface in Week View. The header displays the date range 10/18/2010 - 10/24/2010. The calendar grid shows activities for users and resources. Callouts 1-5 highlight specific features: 1 points to the user/resource header bar, 2 to a 'Marketing & Sales Meeting' activity, 3 to the 'GroupCalendar View Settings' panel, 4 to the 'Show 24 hours...' dropdown, and 5 to a 'Meeting' activity.

Microsoft Dynamics CRM | Workplace | GroupCalendar | Search CRM data | Michael Dohr Standard

NEW ACTIVITY | NEW RECORD | IMPORT DATA | POWERSEARCH | SMARTBAR DIALOG | POWERSEARCH (SL) | POWER SEARCH

Month View | Week View | Day View | All Users

10/18/2010 - 10/24/2010

1 Chris Preston | Christian Ternek

all day Marketing & Sales Meeting

08:00 Breakfast Location: Prag Max Mustermann

09:00am Keynote Chris Preston

12:00pm Meeting Location: Room 123

01:00pm Lunch

2 Show 24 hours...

3 GroupCalendar View Settings

Oct 2010

	Mo	Tu	We	Th	Fr	Sa	Su
39		28	29	30	1	2	3
40	4	5	6	7	8	9	10
41	11	12	13	14	15	16	17
42	18	19	20	21	22	23	24
43	5	26	27	28	29	30	31
44	2	3	4	5	6	7	

Extended Select:

- Select Users/Resources
- Settings

Users:

All Users

Which activities should be shown:

New Activity

- Task
- Fax
- Phone Call
- Email
- Letter
- Appointment
- Service Activity

Options:

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

Figure 13: GroupCalendar – TopDown View (Week View)

GroupCalendar for Microsoft Dynamics CRM 2015/2016 and Dynamics 365

1 HEADER

In the header, the different users, resources and facilities are grouped by week. The different activities are grouped below.

2 ALL DAY ACTIVITIES

These activities are displayed at the beginning of the specific day if you have previously saved them as "all day activity" in your Microsoft Dynamics CRM. Click on them to see details.

3 SWITCH THE WEEK

In the calendar, as well as in the header of SideBar, you can switch from week to week by clicking on a certain week number.

4 SWITCH THE USER, GROUP OR FACILITY

To see more than one user/group or facility, simply scroll the bar from left to right.

5 COLOR-CODED ACTIVITIES

The displayed activities are color coded in our traditional way.

2.6 The GANTT View

This view displays all activities depending on their duration. Appointments that are expected to last long **1**, are displayed in a larger bar than activities that are expected to last a short time **2**.

The screenshot displays the Microsoft Dynamics CRM GroupCalendar interface in Gantt View. The top navigation bar includes 'Microsoft Dynamics CRM', 'Workplace', and 'GroupCalendar'. Below the navigation bar, there are several toolbars for activity management and search. The main area is divided into a list view and a Gantt chart. The list view shows a table of service activities with columns for Subject, Scheduled End, Scheduled Start, Owner, and Created On. The Gantt chart shows activities for two days, 10/18/2010 and 10/19/2010, with bars representing the duration of each activity for different users. The settings panel on the right allows for configuring the view, including selecting users/resources and defining which activities should be shown.

Subject	Scheduled End	Scheduled Start	Owner	Created On
Bottom bracket servicing	11/11/2009 9:00 pm	11/11/2009 2:00 pm	Michael Dohr	10/21/2009 ...
Bulk assembly for 50 mountai...	9/30/2009 2:30 pm	9/30/2009 1:30 pm	Michael Dohr	10/21/2009 ...
Chain tightening and lube	10/28/2009 8:30 pm	10/28/2009 6:00 pm	Michael Dohr	10/21/2009 ...
Chain tightening and lube	10/7/2009 4:00 pm	10/7/2009 1:00 pm	Michael Dohr	10/21/2009 ...
Chainwheel Repair	9/30/2009 8:00 pm	9/30/2009 1:00 pm	Michael Dohr	10/21/2009 ...

Figure 14: GroupCalendar – GANTT View

3 GROUP CALENDAR USER MENU

The bar shows the different users. Also, facilities and/or resource groups can be shown here.

4 MANAGE ACTIVITIES

Different colors show different types of activities. Activities can be easily modified via drag & drop. This way, you can change the time of the activity, as well as the user.

5 UNSCHEDULED ACTIVITIES

The view also provides you with an overview on unscheduled activities. With a click on the **[Unscheduled activities]**-button, you can hide or show the unscheduled activities. For further information on unscheduled activities, please have a look at [CHAPTER 2.6.1 THE UNSCHEDULED ACTIVITIES-VIEW ON PAGE 28](#).

6 DATE RANGE

Set a date range by selecting a start- and an end-date to display the scheduled activities/resources with a specific date range only.

2.6.1 The unscheduled activities-View

The unscheduled activity view lists all unscheduled appointments or service activities ①. All with no attendee assigned will be marked as unscheduled. These specific activities can be assigned to a user by drag & drop ②. In contrary, also scheduled activities can be unscheduled by drag and drop. ③

The screenshot displays the Microsoft Dynamics CRM GroupCalendar interface. At the top, the navigation bar includes 'Microsoft Dynamics CRM', 'Workplace', and 'GroupCalendar'. A search bar and user profile 'Michael Dohr Standard' are also visible. Below the navigation bar, there are tabs for 'Service Activities' and 'Appointments', with a filter set to 'All unscheduled service activities'. A table lists various service activities with columns for Subject, Scheduled End, Scheduled Start, Owner, and Created On. A callout '4' points to the 'Subject' column. A callout '1' points to a row in the table. A callout '3' points to a row being dragged from the table to the Gantt view. A callout '2' points to a 'Drag me to schedule' box in the Gantt view. A callout '5' points to the 'UNSCHEDULED ACTIVITIES' section in the Gantt view. A callout '6' points to the 'GroupCalendar View Settings' panel on the right, which includes a calendar for October 2010 and a 'Users' section.

Figure 15: GroupCalendar – GANTT View with unscheduled records

4 **MANAGE UNSCHEDULED ACTIVITIES**

You can switch between Appointments and Service Activities by selecting the corresponding tab. Sort the different columns by setting the arrow next to the columns' header (here: *Subject*) up or down. Click and hold [Shift] in order to sort multiple columns.

5 **RESIZE THE UNSCHEDULED ACTIVITIES WINDOW**

Hovering over the **[Unscheduled Activities]**-button will give you the opportunity to resize the window.

2.7 The Timeline View

This view offers a detailed overview of all your activities. All users' activities are listed chronologically and vertically, even when two appointments are scheduled at the same time **1**.

The screenshot displays the Microsoft Dynamics CRM GroupCalendar interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'Workplace', and 'GroupCalendar'. A search bar and user profile 'Michael Dohr Standard' are also visible. The main area shows a Gantt chart view for the week of October 18-24, 2010. A 'Timeline' view is selected, showing a vertical list of activities for each user. Callouts 1 through 6 highlight specific features: 1 points to a vertical stack of activities for Max Mustermann; 2 points to the 'Copy Activity Delete' context menu; 3 points to an activity for Tom Patterson; 4 points to the 'Timeline' view selection in the left-hand menu; 5 points to an appointment details pop-up; and 6 points to the 'Copy Activity Delete' button. A 'GroupCalendar View Settings' panel is open on the right, showing a calendar grid and various settings for displaying activities.

Figure 16: GroupCalendar – GANTT View with unscheduled records

2 GROUPCALENDAR USERS, FACILITIES AND RESOURCES OVERVIEW

The bar at the left side shows you all available users, facilities and resources listed. Scroll up and down with the Scroll-bar at the right side to see all users, if necessary.

3 ACTIVITY OVERVIEW OVERVIEW

All activities are displayed with the same width/size, no matter how much time is scheduled.

4 AVAILABILITY OF TIMELINE VIEW

The Timeline view can be opened in a month-, week- or day view and all information given here is as applicable to all Timeline views.

5 ACTIVITY DETAILS

When hovering over an activity, all details will be displayed.

6 COPY OR DELETE AN ACTIVITY

To modify a certain activity, simply right click on it and select the modification you would like to apply to the activity (*delete* or *copy*).

2.8 The Agenda View

This view provides users with an overview of every GroupCalendar view (Month-, Week-, Day-View). With a double-click, activities can be opened **1**. With a click on the x, activities can be deleted **2**. The default view can be grouped by Date & Resources or grouped by Resources and Date **3** in the settings. For further information on the settings, please have a look at [CHAPTER 1.2.2 THE DEFAULT SETTINGS ON PAGE 12](#).

The screenshot displays the Microsoft Dynamics CRM GroupCalendar interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'Workplace', and 'GroupCalendar'. Below this is a search bar and user profile information for 'Michael Dohr Standard'. The main area shows a calendar view for '10/18/2010 - 10/24/2010', currently in 'Week View'. The calendar is grouped by resource, showing activities for 'Max Mustermann' and 'Tom Patterson'. Callout 1 points to a 'Breakfast' activity on Wednesday, October 20th, which is highlighted with a blue border. Callout 2 points to a small 'x' icon on the right side of the same activity, used for deletion. Callout 3 points to the 'Resource' column header in the top-left corner of the calendar grid. On the right side, the 'GroupCalendar View Settings' panel is open, showing a calendar navigation tool and a list of activity types to be shown, including Task, Fax, Phone Call, Email, Letter, Appointment, and Service Activity.

Resource	Date	Time	Appointment
Max Mustermann	20 Wednesday October, 2010	7:00 am - 9:00 am	Breakfast Location: Prag Max Mustermann
	21 Thursday October, 2010	7:00 am - 9:00 am	Breakfast Location: Prag Max Mustermann
	22 Friday October, 2010	7:00 am - 9:00 am	Breakfast Location: Prag Max Mustermann
	18 Monday October, 2010	7:00 am - 9:00 am	Breakfast Location: Prag Max Mustermann
		9:00 am - 6:15 pm	CEE Partner Day Tom Dohr, Max Mustermann
		7:35 pm - 8:35 pm	Vision Keynote
	19 Tuesday October, 2010	7:00 am - 9:00 am	Breakfast Location: Prag Max Mustermann
10:30 am - 11:30 am		General Sessions Max Mustermann	
20 Wednesday October, 2010	7:00 am - 9:00 am	Breakfast Location: Prag Max Mustermann	
21 Thursday October, 2010	7:00 am - 9:00 am	Breakfast Location: Prag Max Mustermann	
22 Friday October, 2010	7:00 am - 9:00 am	Breakfast Location: Prag Max Mustermann	
Tom Patterson	19 Tuesday October, 2010	10:30 am - 12:00 pm	Go to grocery store
		2:30 pm - 4:00 pm	Hands-on labs

Figure 17: Agenda view – grouped by resource

3 Tutorials (“How To’s”)

This chapter provides you with helpful tutorials that show you how to work with GroupCalendar efficiently. For a better overview, the starting point of the tutorials is always the MonthView > Overview. For further information on how to open GroupCalendar, please have a look at [CHAPTER 1.1 HOW TO ACCESS GROUPCALENDAR ON PAGE 5](#).

3.1 How to create a new activity – Shortcut

Sometimes, when being in a hurry, you might not have time to set a new activity properly. That is why you can also create a quick appointment in GroupCalendar.

Open GroupCalendar

- 1) Double-click into a random date field and enter your appointment details there.

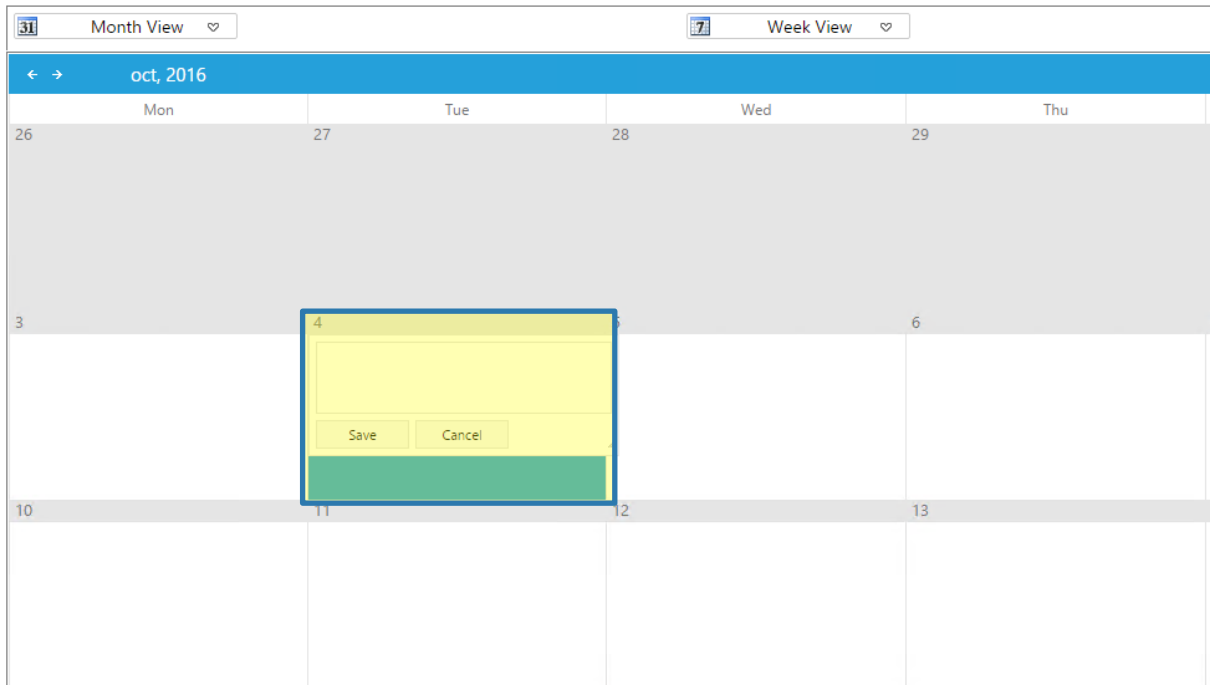


Figure 18: Double click for new appointment

- 2) Click on the **[Save]**-button in order to save your settings. Click on the **[Cancel]**-button in order to cancel your changes.
- 3) Once saved, the details are displayed in Group Calendar as shown in figure 19.

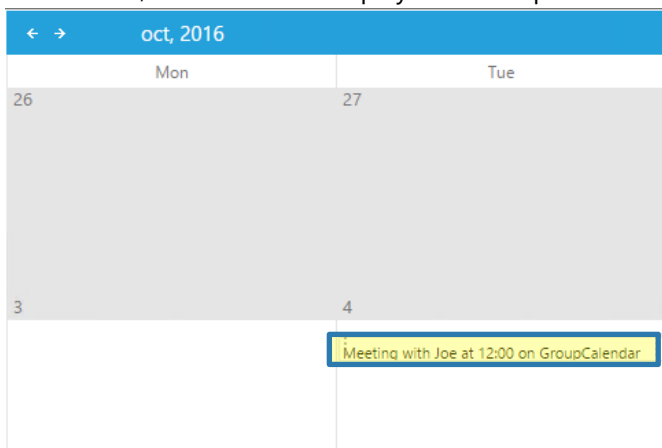


Figure 19: Quickly saved new appointment

- 4) Later, as soon as you have time, you can define the details of the activity. To do so, double click on the activity you have saved previously. In the window that opens now, you can define all the details. As you can see, you can set different categories. For further information on how to set these categories, please have a look at [CHAPTER 3.2 HOW TO CREATE A NEW ACTIVITY PROPERLY ON PAGE 36](#). However, as soon as you have finished, do not forget to save your settings!

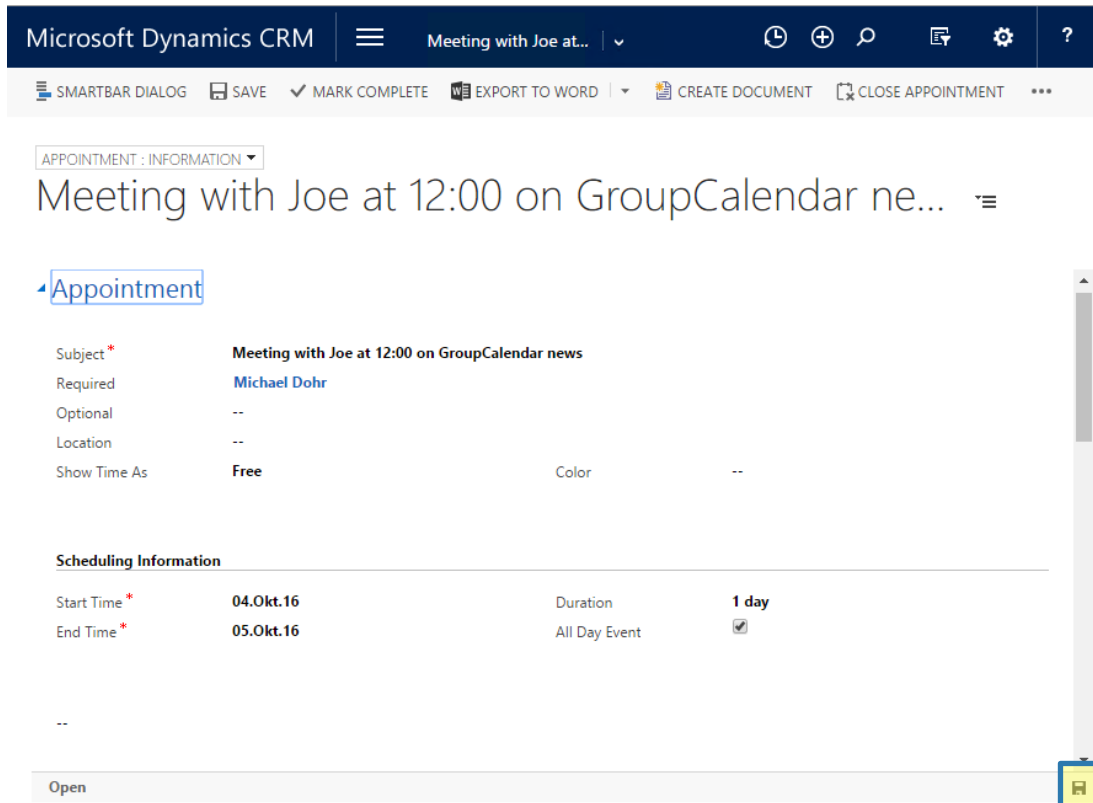


Figure 20: Change activity details

3.2 How to create a new activity properly

Unlike shown in the previous chapter, activities can also be created with all details attached from the very start.

- 1) Select a date in GroupCalendar. Once selected, it is highlighted in blue.
- 2) To create a new activity properly, decide which activity you would like to create and click on the **[New Activity]**-button in the SideBar. For further information on the SideBar, please have a look at [CHAPTER 1.2.1 THE SIDEBAR ON PAGE 9](#). In the so opened drop down menu, select your preferred activity. In our tutorial, we want to create a new appointment, so we click on *Appointment*.

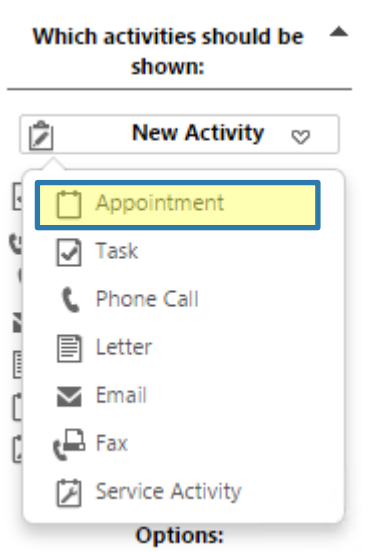


Figure 21: Create new activity

- 3) Please insert the appointment details in the so opened window.



All fields marked with a * are mandatory, all other fields are optional. Because the single activities do have various requirements, also the fields that can vary. Please understand, that due to space restrictions we will only explain the fields of one activity (here: *Appointment*). However, the differences between the single activities are not that huge. Should you have any questions you can contact our support anytime via email at support@mscrm-addons.com.

Anyway, figure 22 to figure 24 show you how to create a new activity properly.

APPOINTMENT : INFORMATION ▾

New Appointment

Appointment

1 Subject* GroupCalendar meeting with Joe

2 Required --

Optional --

3 Location --

Show Time As Busy 4 Color --

5 Scheduling Information

Start Time* 27.Okt.16 09:00 Duration 30 minutes

End Time* 27.Okt.16 09:30 All Day Event

--

Figure 22: Create activity properly I

1 SUBJECT (MANDATORY)

Enter your subject here (a title that summarizes the appointments' content).

2 REQUIRED & OPTIONAL (OPTIONAL)

Enter the required/optional teams, groups, resources and users here. The fields are Lookup-fields and thus, connected with your CRM data.

3 LOCATION (OPTIONAL)

Insert your location here.

4 COLOR

Should you have activated the color code functionality, you can select a color here. For further information on how to configure the color code functionality, please have a look at our [GroupCalendar Install Guide in our documentation area](#).

5 SCHEDULING INFORMATION (MANDATORY AND OPTIONAL)

In this section, you can set the start- and ending-time of your appointment. These two fields are mandatory. You can as well set a duration time by selecting one of the entries in the drop-down menu or by checking the box next to *All day event*.

Once set, please save your settings. Then, scroll down to get to the next section of the *New Appointment* - window.

Notes

NOTES

No records found.

1

Attachments

Activity Attachment Associated Vi... ▾

Search for records



2

File Name ↑

File Size (Bytes)

To enable this content, create the record.

Figure 23: Create activity properly II

1 NOTES (OPTIONAL)

In this section, you can add notes, like a reminder to take some documents with you to the appointment or some information on the person you are going to meet.

2 ATTACHMENTS (OPTIONAL)

Add some attachments here. Use the Look-up field to search for attachments saved on your computer or any other device, as for example quotes or documents.



Before you can add an attachment, you have to save the activity – record (here: *appointment*). The files you attach here will be saved in your CRM.

The files do have a maximum size that depends on your CRM configuration settings.

Once set, please do not forget to save your settings. Afterwards, scroll down even further to get to the last section of the *New Appointment* - window. Once finished, do not forget to save your settings!

Details 1

Regarding	--	Organizer	Michael Dohr
Owner *	Michael Dohr	Sub-Category	--
Category	--		

Conflicts Tab 2

Scheduling Information

Figure 24: Create activity properly III

1 DETAILS (MANDATORY AND OPTIONAL)

In this section, you can refine the details of your appointment. The *Owner* of the appointment is the only mandatory field that exists in this section. This field assigns the appointment to a certain user. Furthermore, you can enter a topic in the *Regarding*-field, select a *Category*, a *Sub-Category* and an *Organizer* for the appointment. These fields are optional.

2 CONFLICTS TAB (INFORMATORY)

The Conflicts tab provides you with information regarding your schedule. Should there be any conflicting activity, it will be displayed here.

3.3 How to add a new resource to a resource group

Resources, like facilities, equipment or even human resources, can be managed in the Microsoft Dynamics CRM Groups. It is quite easy to add a new resource, for example a new laptop, a new car or a new room. This tutorial gives you a short overview on how to create a new resource and how to add it to a resource group.

- 1) Open the Microsoft Dynamics CRM Settings > Business Management > Facilities/Equipment

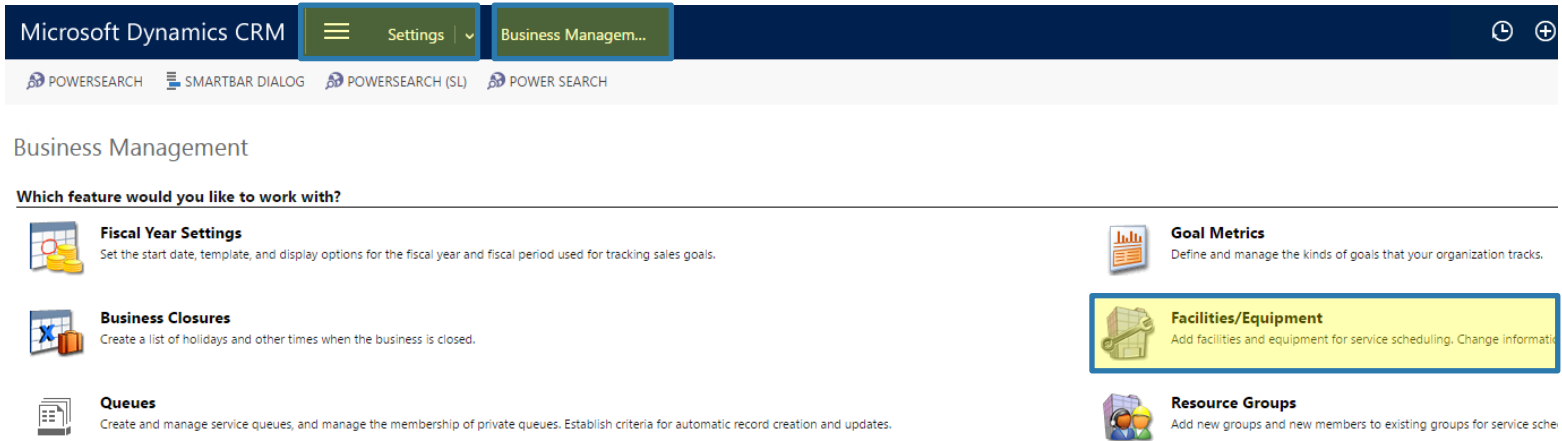


Figure 25: Open CRM Settings > Business Management > Facilities/Equipment

- 2) Now click on the **[New]**-button ① in the left upper corner. In the so opened window, enter your new facilities' name and details ②. Then click on the **[Save and Close]**-button.

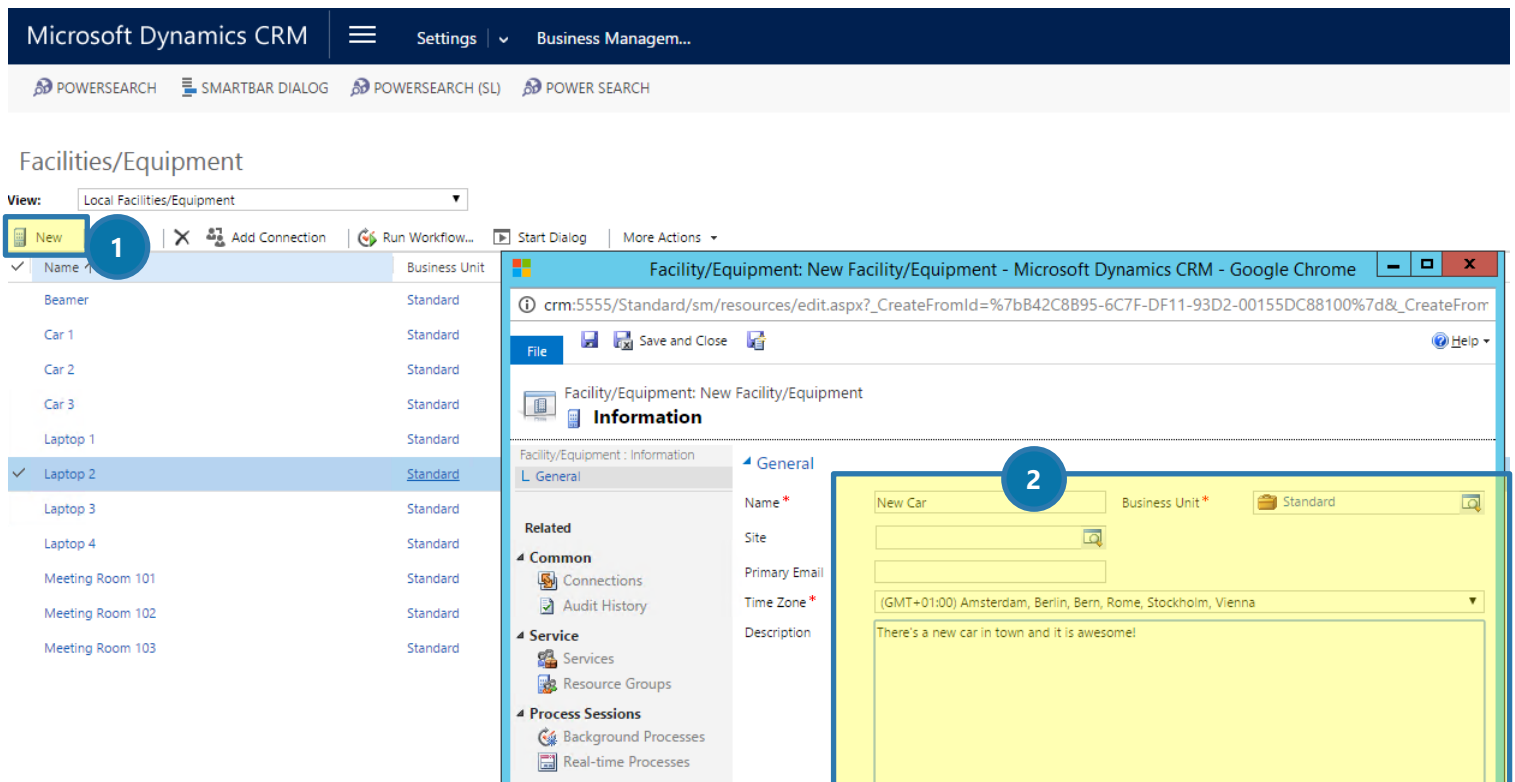


Figure 26: Create new facility

3) The new resource (here: *New Car*) has been added to the Facilities/Equipment list.

Name ↑	Business Unit
Beamer	Standard
Car 1	Standard
Car 2	Standard
Car 3	Standard
Laptop 1	Standard
Laptop 2	Standard
Laptop 3	Standard
Laptop 4	Standard
Meeting Room 101	Standard
Meeting Room 102	Standard
Meeting Room 103	Standard
New Car	Standard

Figure 27: New facility added to list

4) Now go back to the Business Management section and open the Resource Groups.

Microsoft Dynamics CRM | Settings | Business Managem...

POWERSEARCH | SMARTBAR DIALOG | POWERSEARCH (SL) | POWER SEARCH

Business Management

Which feature would you like to work with?

- Fiscal Year Settings**
Set the start date, template, and display options for the fiscal year and fiscal period used for tracking sales goals.
- Business Closures**
Create a list of holidays and other times when the business is closed.
- Queues**
Create and manage service queues, and manage the membership of private queues. Establish criteria for automatic record creation and updates.
- Goal Metrics**
Define and manage the kinds of goals that your organization tracks.
- Facilities/Equipment**
Add facilities and equipment for service scheduling. Change informatio
- Resource Groups**
Add new groups and new members to existing groups for service sche

Figure 28: Open CRM Settings > Business Management > Resource Groups

GroupCalendar for Microsoft Dynamics CRM 2015/2016 and Dynamics 365

- 5) Again, click on the **[New]**-button. Create a new group in the so opened window, here: *New group*. Then click on the **[Save]**-button.

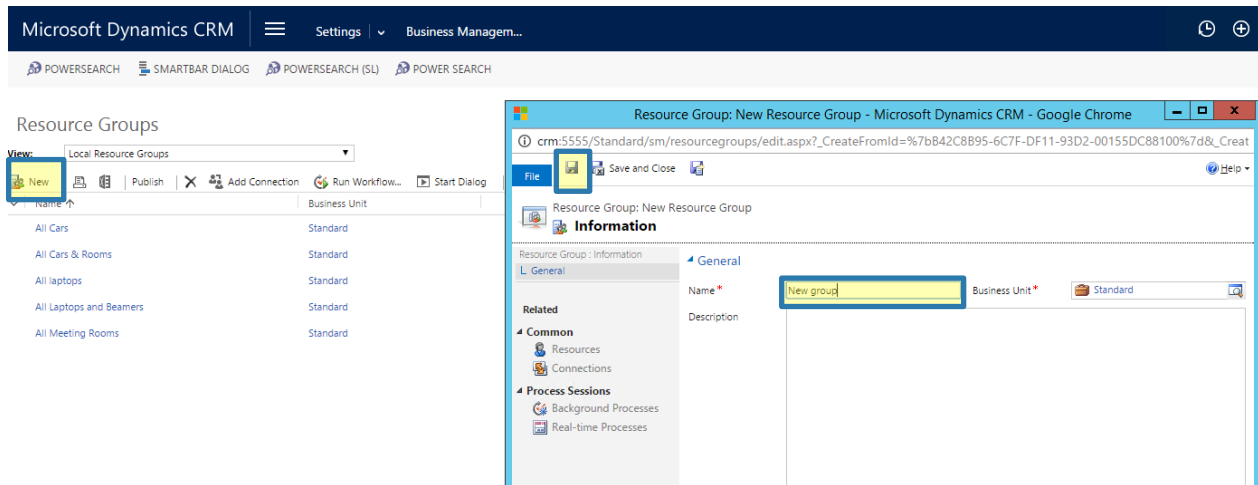


Figure 29: Create new resource group

- 6) Now click on the **[Resources]**-button on the left side.

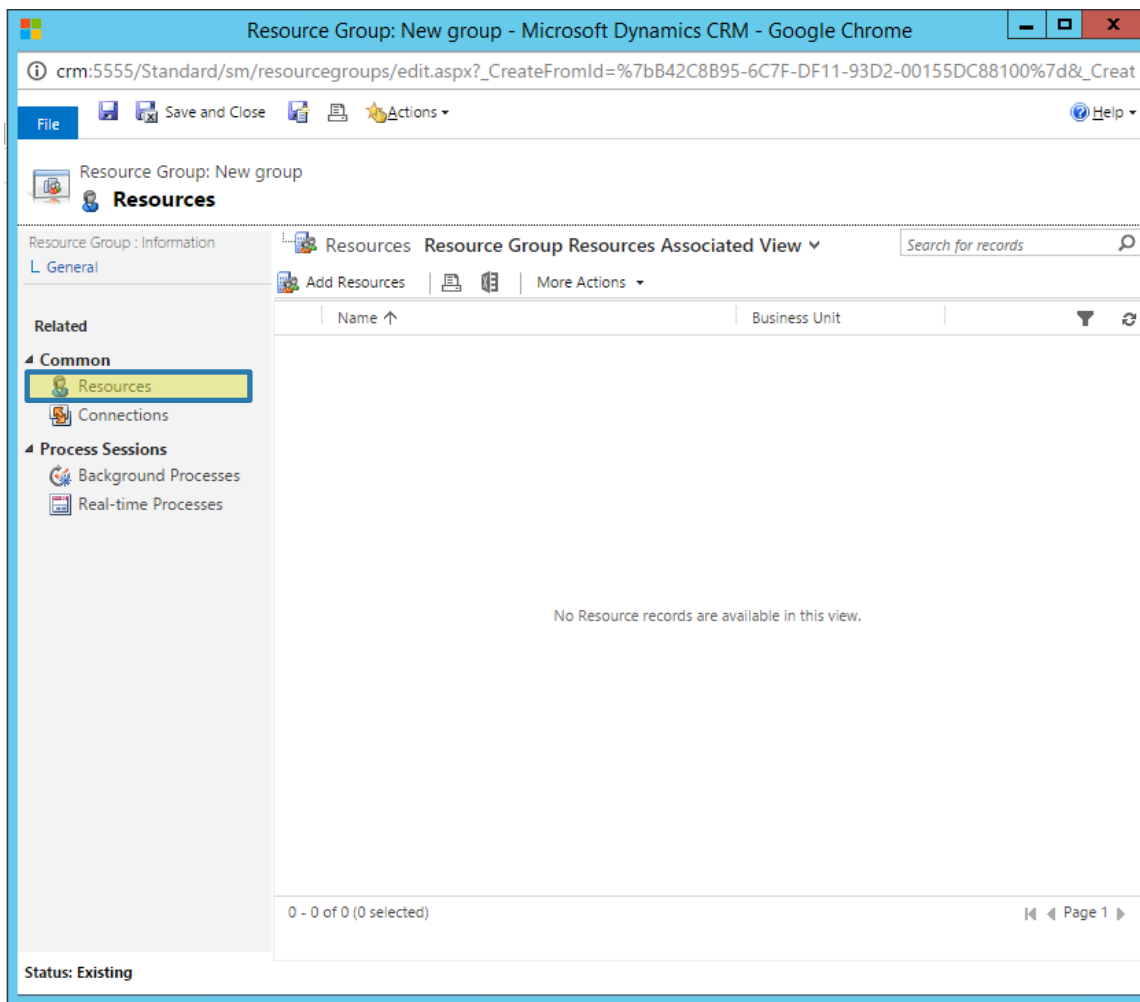


Figure 30: Add Resources

GroupCalendar for Microsoft Dynamics CRM 2015/2016 and Dynamics 365

- 7) In the so opened window, select the resources **1** you would like to add to the group.
Here: *Car 1 – 3* and *New Car*. Use the scrollbar at the right side to scroll through the entries. The added records can be seen in an overview **2** at the bottom. Once you are finished, click on the **[Add]**-button **3**.

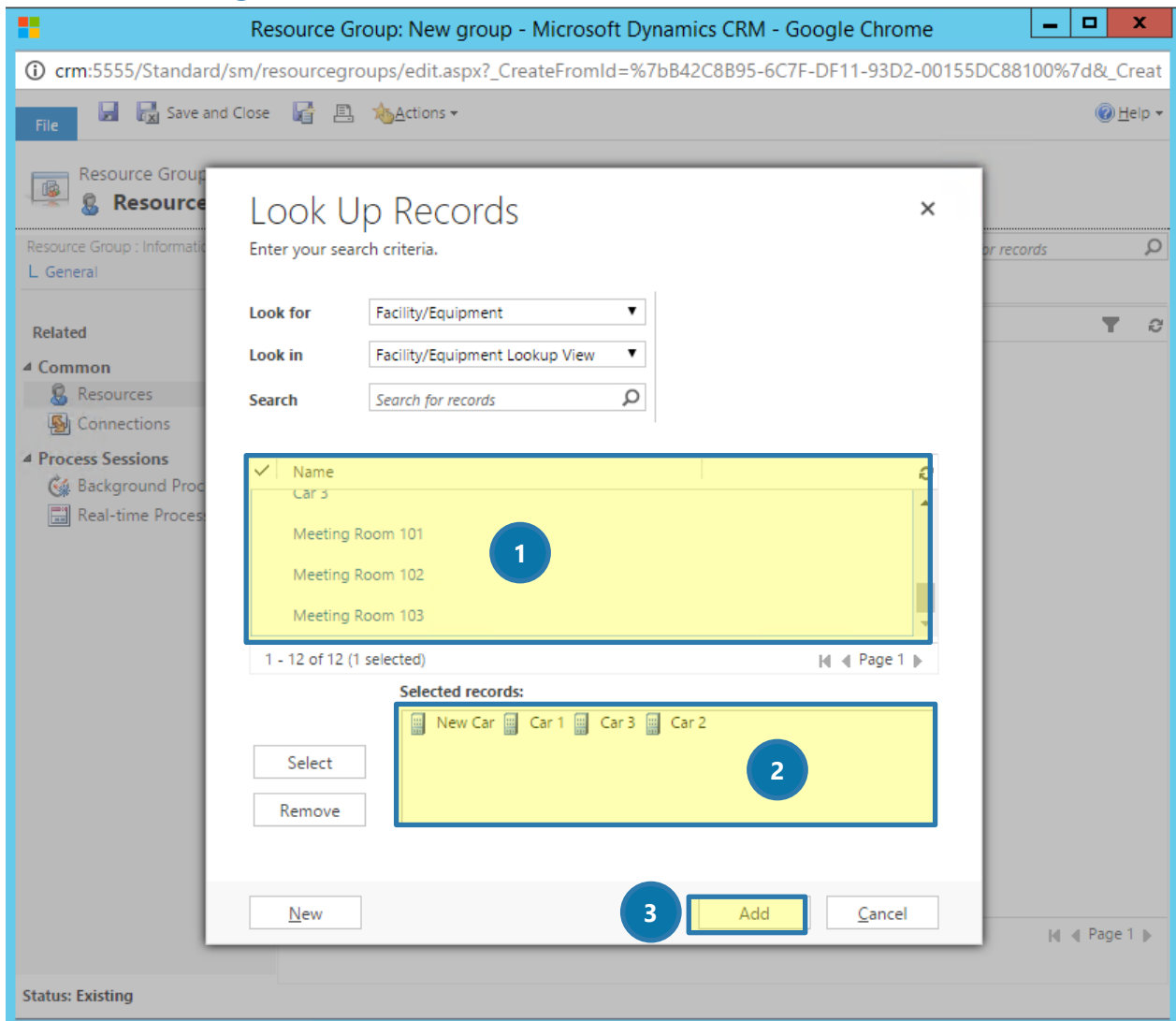


Figure 31: Add resources to new group

GroupCalendar for Microsoft Dynamics CRM 2015/2016 and Dynamics 365

- 8) Now all the resources are added to the new group. Check it and do not forget to save the changes.

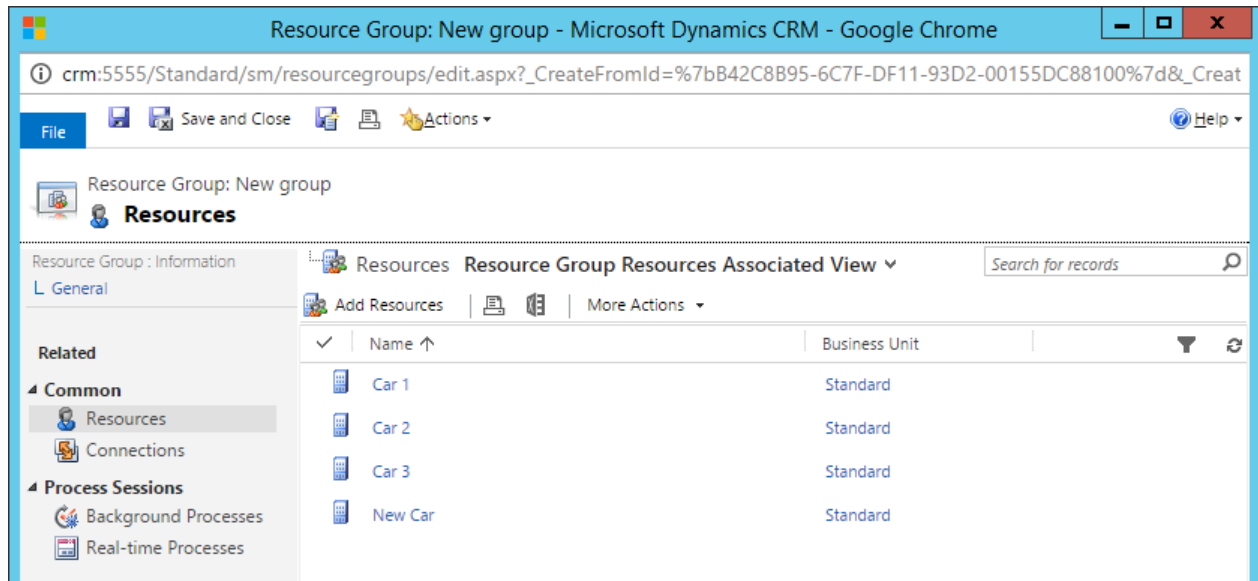


Figure 32: New resource group – result

- 9) Back in GroupCalendar, you open the view selection. You will see, that your recently created facility (here: *New Car* ①), as well as the recently created group (here: *New group* ②) can now be selected. Now click on the **[Reset Resource Cache]**-button in the settings in order to delete cached data. Well done, that's it!

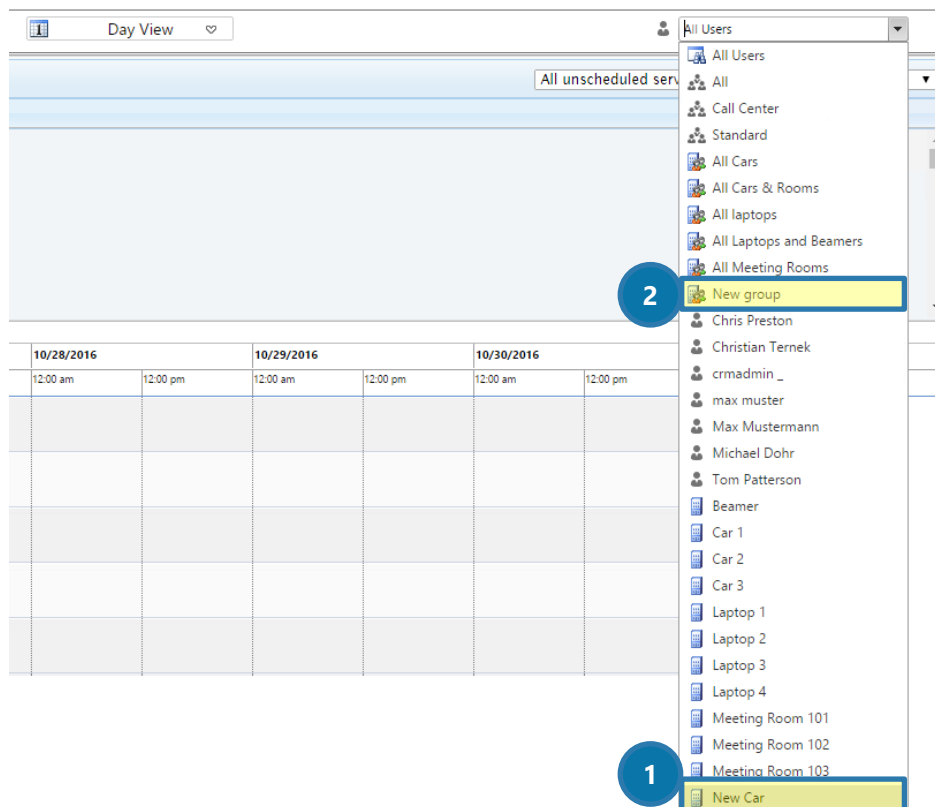


Figure 33: New resource and new resource group can be selected now in MS Dynamics CRM

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5 Contact

For further technical questions, please visit our blog <http://blogs.mscrm-addons.com> or contact support@mscrm-addons.com.

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