

USER GUIDE

Created by MyCRM Ltd

MyActivityCalendar Administration guide

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Contents

Description
Introduction3
Security Roles
Planner Calendars4
General4
Name4
Default View4
Subscriber Type5
Query Page Size5
Participants6
Views
Activity types6
Participation types8
Associations



Description

MyActivityCalendar is a configurable solution for Microsoft Dynamic 365 that enables users to display all of the Activities on the system in an intuitive way. It also allows the user to reschedule the Activities with a simple drag and drop interface.

This document covers the MyActivityCalendar configuration options available to a Microsoft Dynamic 365 administrator and the impact of these options at the user level.

Introduction

The MyActivityCalendar solution enables the creation of multiple Planner calendars, each of which can be used to organise Dynamics 365 Activities in a specific manor. Each user has their own Preferences section, where they can change the more personalised options such as their default view, the colours used to display the Activities and how that Activity is launched in their browser.

Security Roles

MyActivityCalendar contains two Security Roles, "MyActivityCalendar Administrator" and "MyActivityCalendar User".

If the user requires access to create Planner calendars as well as the Preferences section and calendar, then they will need the "MyActivityCalendar Administrator" role.

If, however the user just needs access to the calendars and the personal Preferences section then they simply require the "MyActivityCalendar User" role.



Planner Calendars

Only a Microsoft Dynamic 365 user with the "MyActivityCalendar Administrator" role can create or amend a Planner calendar. Once the MyActivityCalendar solution has been installed the Planner calendar section can be found under the MyCRM menu.

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Sales	Service		Marketing	4	Settings	O	MyCRM				Training		}
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The Planner Calendar is separated into five sections, each section containing elements pertinent to the calendar that will be displayed to the User.

General

Dynamics 365	MyCRM ~	Planner Calendar 🔉 User	rs >		م	9 +	\mathbb{Y}		?	
+ NEW 🔓 DEACTIVATE	🛅 DELETE 🕫 EMAI	l a link 🛛 🕸 RUN WORKFLOW	START DIALOG	WORD TEMPLATES	RUN REPORT	FORM ED	ITOR	ŕ	\downarrow	×
PLANNER CALENDAR : INF USERS ™≡ • General	ORMATION									
Name * Default View Subscriber type	Users Month View Participants			Query Page Size	5,000					

Name

The Name field will be used to identify the specific calendar to both the administrators and the end users, so should be pertinent to the calendars use.

Default View

The calendar has five selectable time periods in which to view the Activities held in the system:

- 1. The Agenda view gives the highest level overview of the Activities for the following days.
- 2. The Day view shows a single days Activities displayed in descending chronological order.
- 3. The Week view shows the seven days (Sunday to Saturday) around the currently selected date.
- 4. The Month view shows a six week block of time. As with the Week view each block runs from Sunday to Saturday.
- 5. The Three month view displays the Activities for the currently selected month along with the previous and next months.

Although all of the views will be available to the end user the selected default view will be used when the calendar is first loaded.



Subscriber Type

By default a calendar will display the Dynamics 365 user's Activities. As the user may be related to the Activity in multiple ways the user is referred to as a Participant. It is also possible to display the Activities that relate to any Dynamics 365 Entity, this relationship type is called a View.

When either a Participant or a View type is selected the relevant options will be loaded in the next section.

Query Page Size

As there is no limit to the amount of Activities that an Entity can be related to it is possible to define the amount of Activity records that should be loaded in a Dynamics Query. For slower environments it is suggested that the Query Page Size field is reduced.



Participants

 Participants 				
No.788 Geol	Hidden	Matthew Electron	Show	CRM REFRESH
My CRM	Show	Only Transac	Show	
Carrier Williams	Show	Alubat Dublecare	Show	
Repay Games	Show			

Each of the Dynamics 365 Users will be added to the Participants section.

As with most sections an individual record can be hidden from the final calendar with the Hide / Show toggle option.

When a new Dynamics User is created this section will have to be reloaded using the Refresh button, be aware this will reset the current option to the default state.

Views

A View can be selected allowing the associated Activities of any Dynamics Entity to be displayed in place of the User.

When creating a View first select the related Entity, then select a View that contains the Entities to be included, finally select the field whose content will be used for the Entity name.

Once the Detail fields are complete the related Entity records will be loaded and as with most sections, the record can be hidden from the final calendar with the Hide / Show toggle option.

ews				
DETAILS				
Entities	Account	✓ Fields	Account Name	\sim
Views	Account Advanced Find View	\checkmark		
ITEMS				
Insets of the (second	Show	Closes, http://doi.phi/	Show	
Administration (Service)	Show	Freedom, Inc. Strength St.	Show	
Res forder Article St.	Show	Of the Study of the	Show	
Contrast Researched	Show	April Dimension.	Show	
A Status Cooperation.	Show	One-Niney-Dampid	Show	
	£h			

Activity types

Activity Types						
C		Internal	Email	Show	Internal	CRM REFRESH
Recurring Appointment	Show	Internal	Task	Show	Internal	
Campaign Response	Show	Internal	Fax	Show	Internal	
Service Activity	Hidden	External	Letter	Show	Internal	
Appointment	Show	Internal	Social Activity	Show	Internal	
Phone Call	Show	Internal				

As not all of the Activity types will be pertinent to each calendar they can be hidden with the Hide / Show toggle option.



By default, when the end user opens an Activity from the calendar it will open in the same tab, this is said to be an internal load, it is also possible to set the Activity to be loaded in a new tab or externally. The Activity target can be selected using the Internal / External toggle option, both of these options are able to be overridden by the user in their preferences.

A default colour has been automatically assigned for each of the system Activities, this colour will be used to represent that Activity type each time it is displayed on a calendar, therefore the colour can be changed to something more relevant, these options can also be overridden by the user in their preferences.

If a custom Activity is created on the Dynamics Instance this section will have to be reloaded using the Refresh button, be aware this will reset the current option to the default state.



Participation types

 Participation 1 	Гурез			
Sender	Hidden	To Recipient	Show	CRM REFRESH
CC Recipient	Show	BCC Recipient	Show	
Required attendee	Show	Optional attendee	Show	
Organizer	Show	Regarding	Show	
Owner	Show	Resource	Show	
Customer	Show			

A User is connected to an Activity through a Participation. When a user hovers the mouse cursor over an Activity the Activity's details will be displayed, this includes all of the returned participants.

As with Activities some of the Participation types may not be relevant or may not be required to be displayed, for instance the Owner and Organiser of an Appointment are commonly the users who created the Activity and they are not necessarily the users who should be seen as having a connection to that Activity, therefore by deselecting a Participation type the user's Participation with any Activity will be omitted from the Activities description.

Associations

To make a calendar available to an end user that User must be given either explicit or implicit access.

An individual user can be given explicit access by associating them with the calendar using the Associate / Disassociate toggle option. In the same way each of the members of a Team can be granted implicit access using the Teams Associate / Disassociate toggle option.

- Associations			
USERS			
NUCLEAR Goal	Dissociated	Matthew Waterson	Dissociated
My CRM	Associated	Only Burner	Dissociated
Sand/William	Dissociated	Marin University	Dissociated
ingogy timesan	Dissociated		
TEAMS			
Reading Activities	Associated		