Created by MyCRM Ltd

MyActivityCalendar

Administration guide

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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.
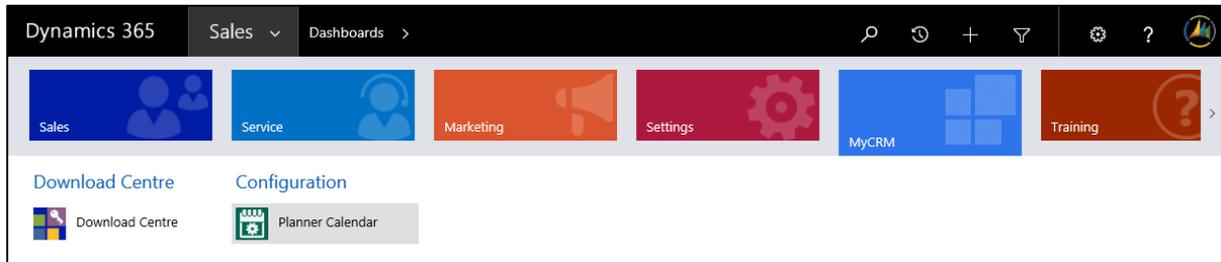
The Planner Calendar is separated into five sections, each section containing elements pertinent to the calendar that will be displayed to the User.

General
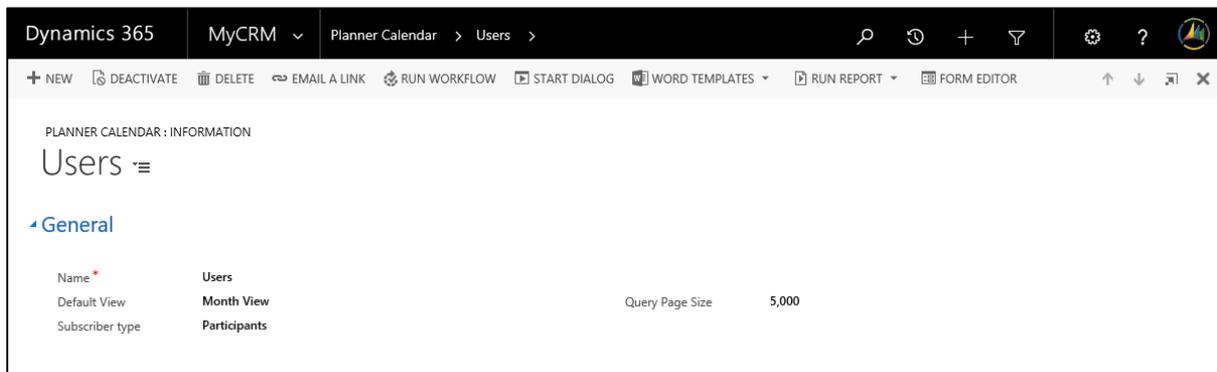
Name

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

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.

Activity types

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

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.