



**mscrm-addons.com**  
GroupCalendar for MS CRM 2013

# GroupCalendar for MS CRM 2013

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## **User Guide**

(How to use GroupCalendar for MS CRM 2013)

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# 1 User Guide

This guide gives detailed explanations of all functionalities provided by **GroupCalendar for MS CRM 2013**.

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 2013 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 2013 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*.

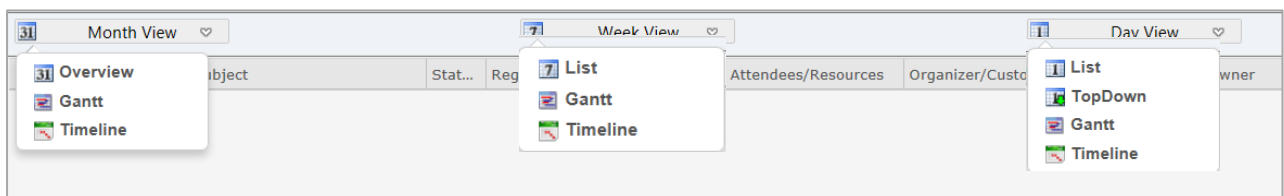
## 2.1 GroupCalendar Views

GroupCalendar for MS CRM 2013 provides different views:

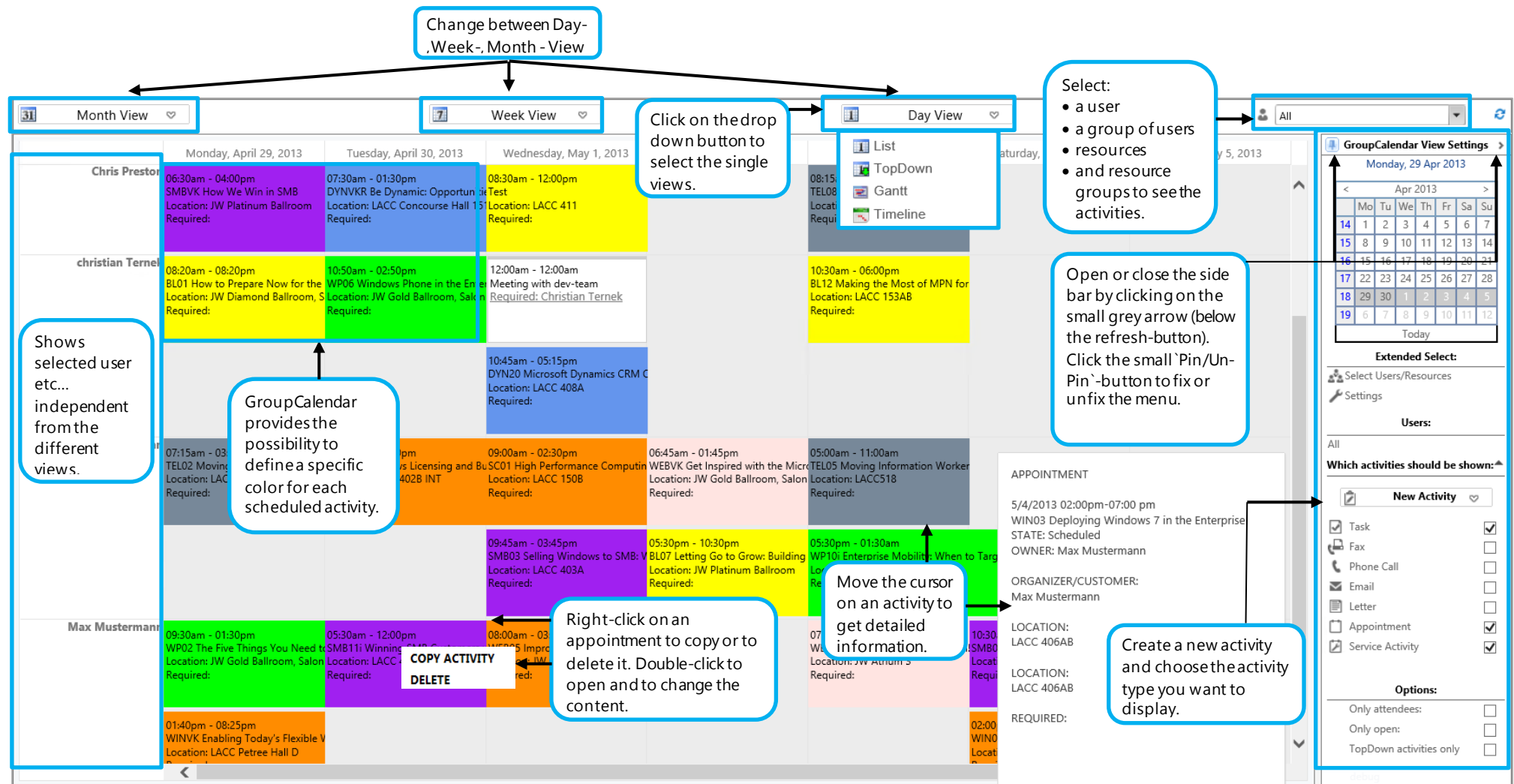
- **Day View**
- **Week View**
- **Month View**

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.
- **Timeline 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**

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

**Select:**

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

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

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

**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.**

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

**Move the cursor on an activity to get detailed information.**

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

**APPOINTMENT**  
5/4/2013 02:00pm-07:00 pm  
WIN03 Deploying Windows 7 in the Enterprise  
STATE: Scheduled  
OWNER: Max Mustermann  
ORGANIZER/CUSTOMER: Max Mustermann  
LOCATION: LACC 406AB  
REQUIRED:

**GroupCalendar View Settings**  
Monday, 29 Apr 2013

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

**Extended Select:**  
Select Users/Resources  
Settings

**Users:**  
All

**Which activities should be shown:**

**New Activity**

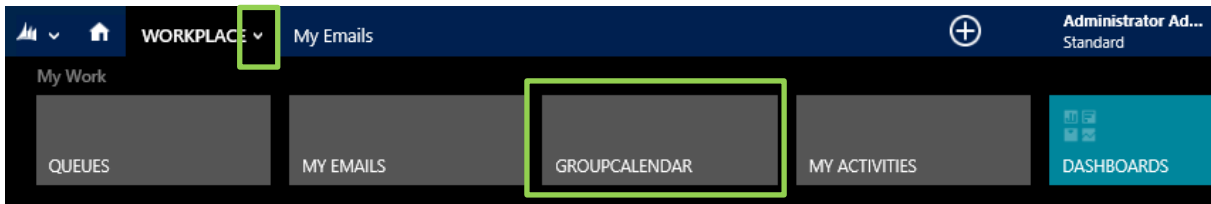
- Task
- Fax
- Phone Call
- Email
- Letter
- Appointment
- Service Activity

**Options:**

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

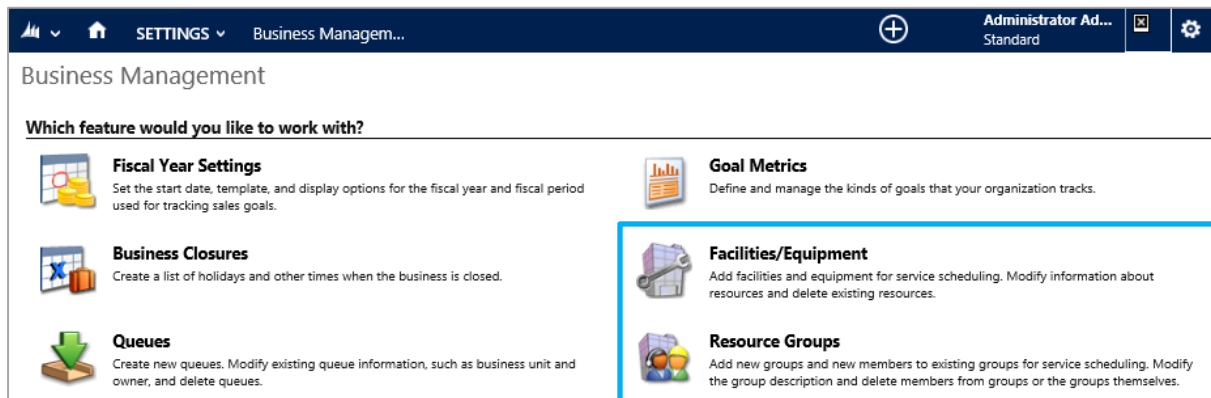
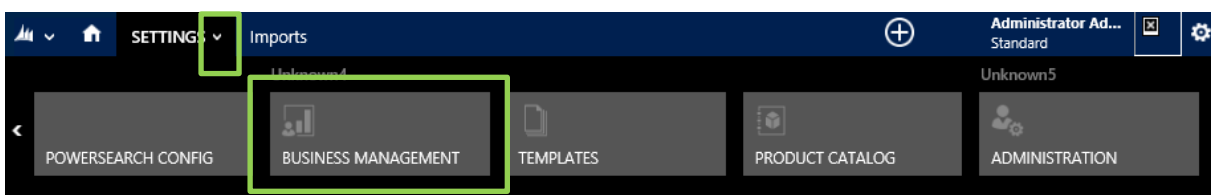
### 3 How To Use GroupCalendar

To access the GroupCalendar, select “Workplace” on the ribbon and open die GroupCalendar for MS CRM 2013. The first time you will see the activities from today.

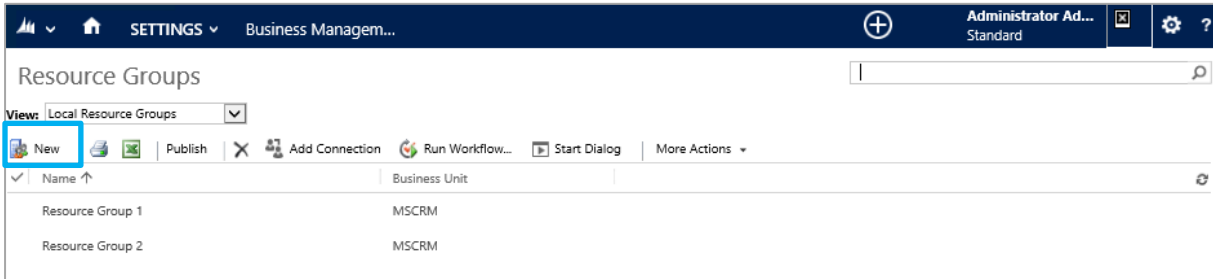


#### 3.1 Resource Management Functionality

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



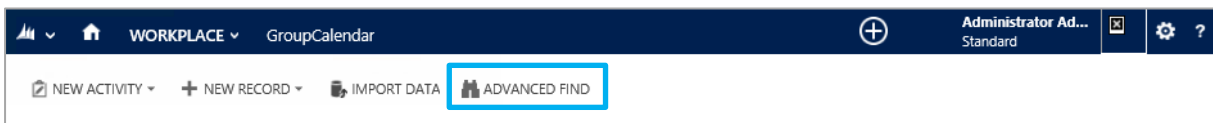
For more details, click on one of the listed Facilities/Equipment or Resource Groups. A new Facility/Equipment or Resource Group can be defined by clicking the new button. If you click save and close and go back to the Group Calendar, you have an overview of all created appointments and activities.



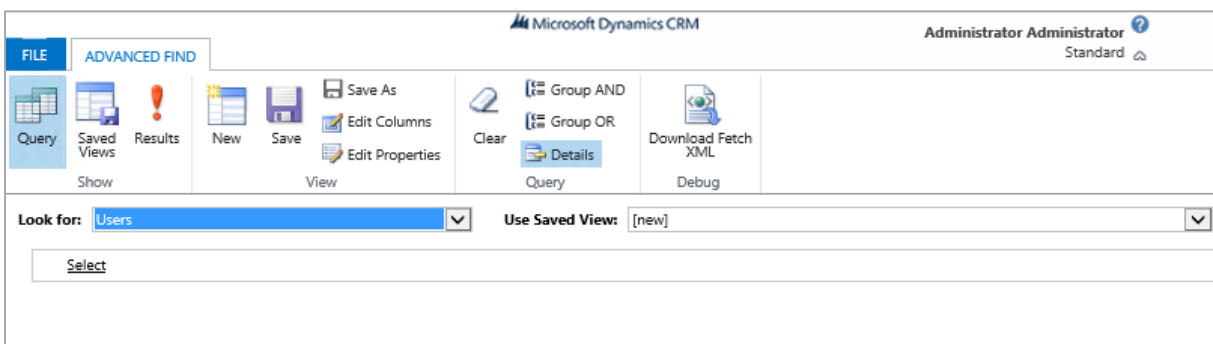
For more information please watch our YouTube video “Resource management with GroupCalendar for MS CRM 2011”: <http://www.youtube.com/watch?v=afIrYUX7HEE>

### 3.2 Define Groups

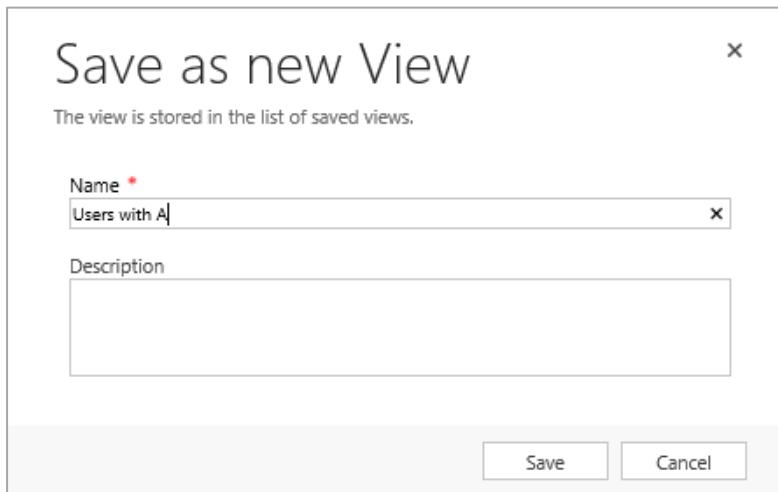
1. Open Advanced Find in MS CRM



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.



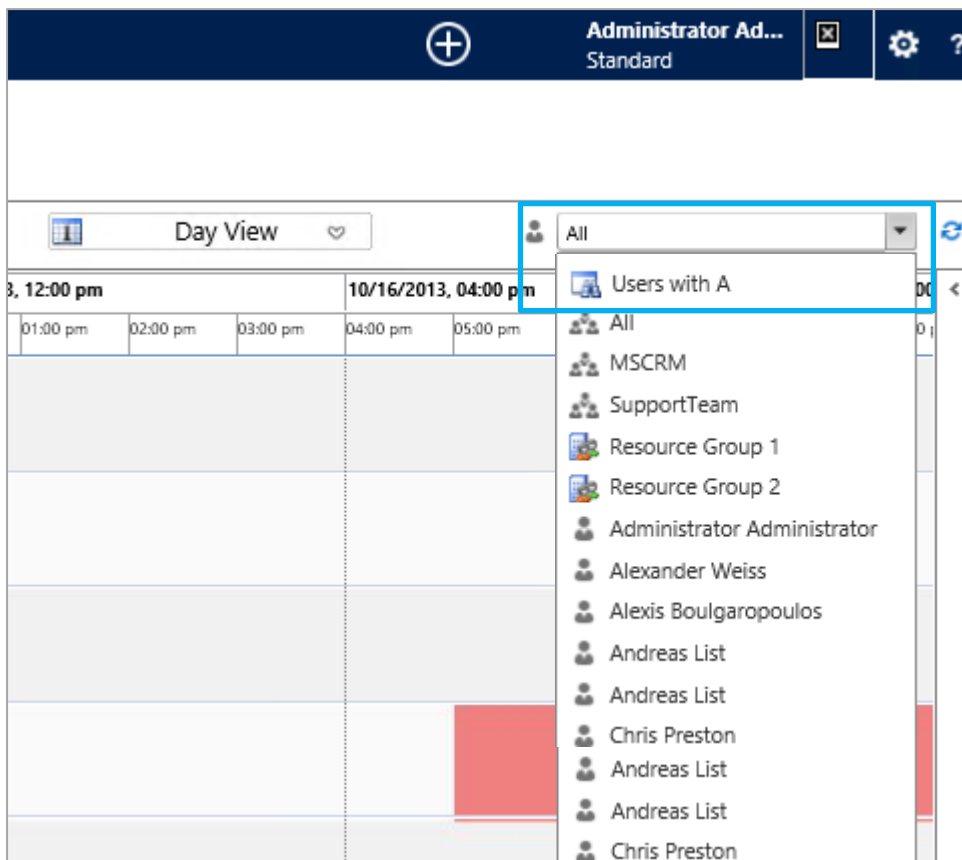
3. Click on "Save as" and give the group a name.



The dialog box is titled "Save as new View" and contains the following elements:

- A close button (X) in the top right corner.
- A message: "The view is stored in the list of saved views."
- A "Name" field with a red asterisk, containing the text "Users with A".
- A "Description" field, which is currently empty.
- "Save" and "Cancel" buttons at the bottom.

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.



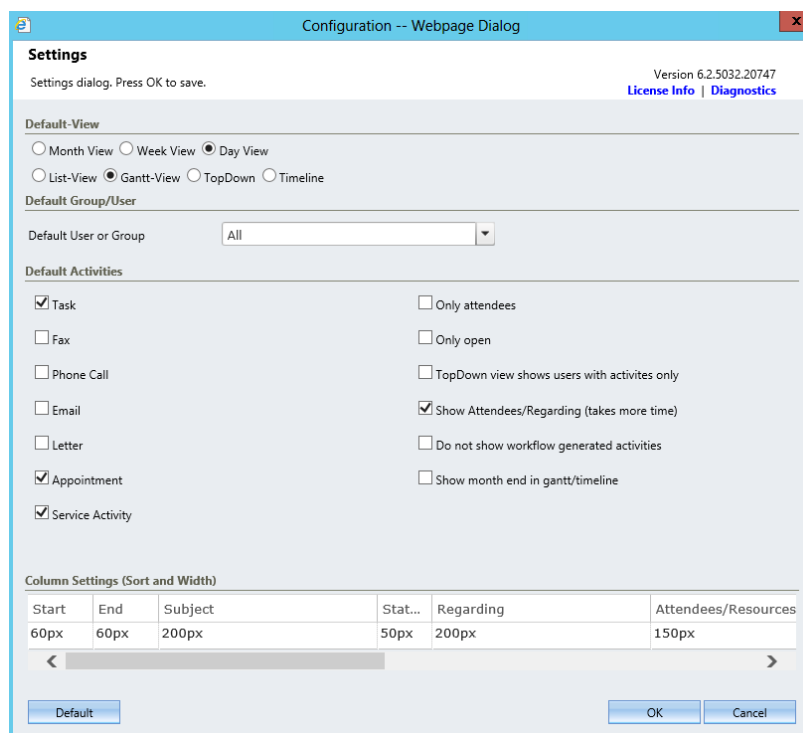


### 3.3 Default Settings

With clicking the "Settings"-Button on the Ribbon, 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 ...



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.

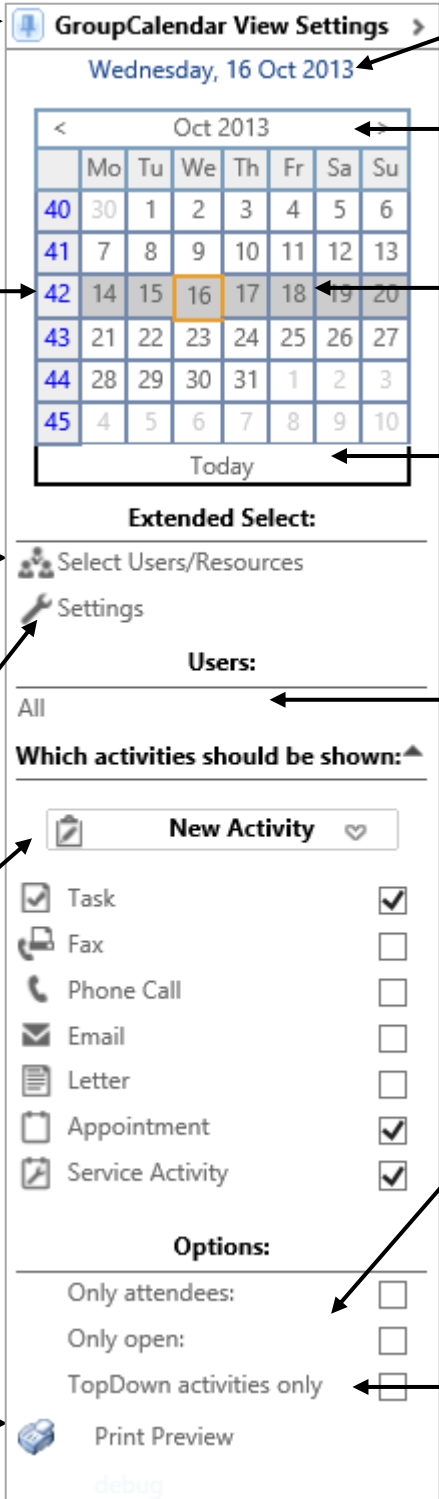
You could also double-click a column and enter the specific width for the column in pixel.

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**

Wednesday, 16 Oct 2013

	Mo	Tu	We	Th	Fr	Sa	Su
40	30	1	2	3	4	5	6
41	7	8	9	10	11	12	13
42	14	15	16	17	18	19	20
43	21	22	23	24	25	26	27
44	28	29	30	31	1	2	3
45	4	5	6	7	8	9	10

Today

**Extended Select:**

Select Users/Resources

Settings

**Users:**

All

**Which activities should be shown:**

**New Activity**

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

**Options:**

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

Print Preview

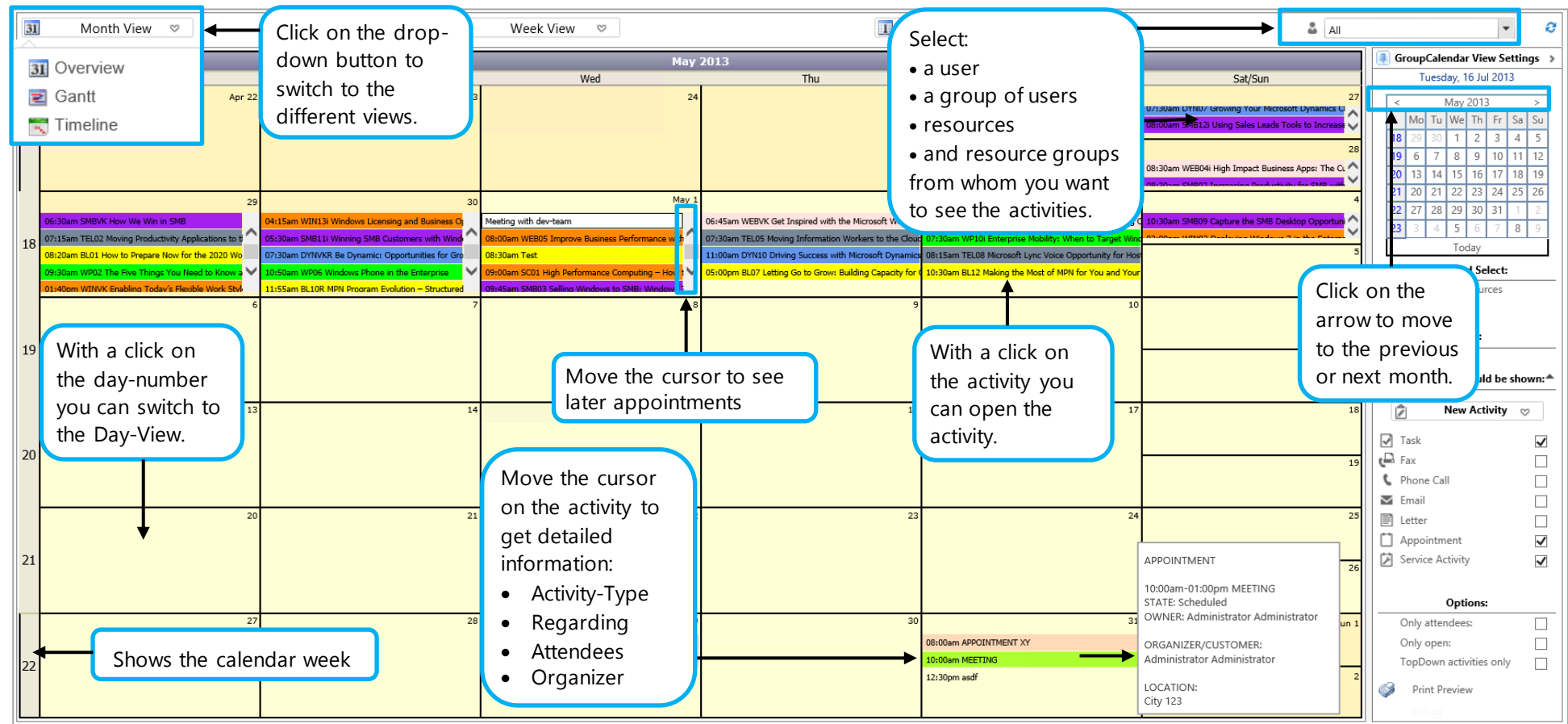
debug

**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 on an arrow.
- With a click on the day you can switch to another day.
- Click on this button to switch to the day-view of today.
- 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.
- With a click on the week number you change automatic into the week view of that week.
- Click this button to select more than one user. This is helpful to see the activities of many users at the same time.

## 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 May 2013. The calendar grid displays various activities with different colors. A sidebar on the left shows navigation options: Overview, Gantt, and Timeline. A top navigation bar includes a view selector (Month View, Week View) and a user selection dropdown (All). A 'GroupCalendar View Settings' panel on the right shows a calendar navigation calendar for May 2013 and a 'Select' dropdown for resources. A 'New Activity' panel at the bottom right lists activity types and options. A detailed appointment popup is visible for a meeting on May 31st.

**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 arrow to move to the previous or next month.**

**With a click on the activity you can open the activity.**

**With a click on the day-number you can switch to the Day-View.**

**Shows the calendar week**

**Move the cursor to see later appointments**

**Move the cursor on the activity to get detailed information:**

- Activity-Type
- Regarding
- Attendees
- Organizer

**APPOINTMENT**  
10:00am-01:00pm MEETING  
STATE: Scheduled  
OWNER: Administrator Administrator  
ORGANIZER/CUSTOMER: Administrator Administrator  
LOCATION: City 123

## 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).



The screenshot shows the GroupCalendar interface in Week View (List). The main area displays a list of activities for the week of Monday, April 29, 2013, to Thursday, May 2, 2013. Each activity row includes columns for Start, End, Subject, Status, Recurrence, Attendees, Location, and Date. The activities are color-coded by resource.

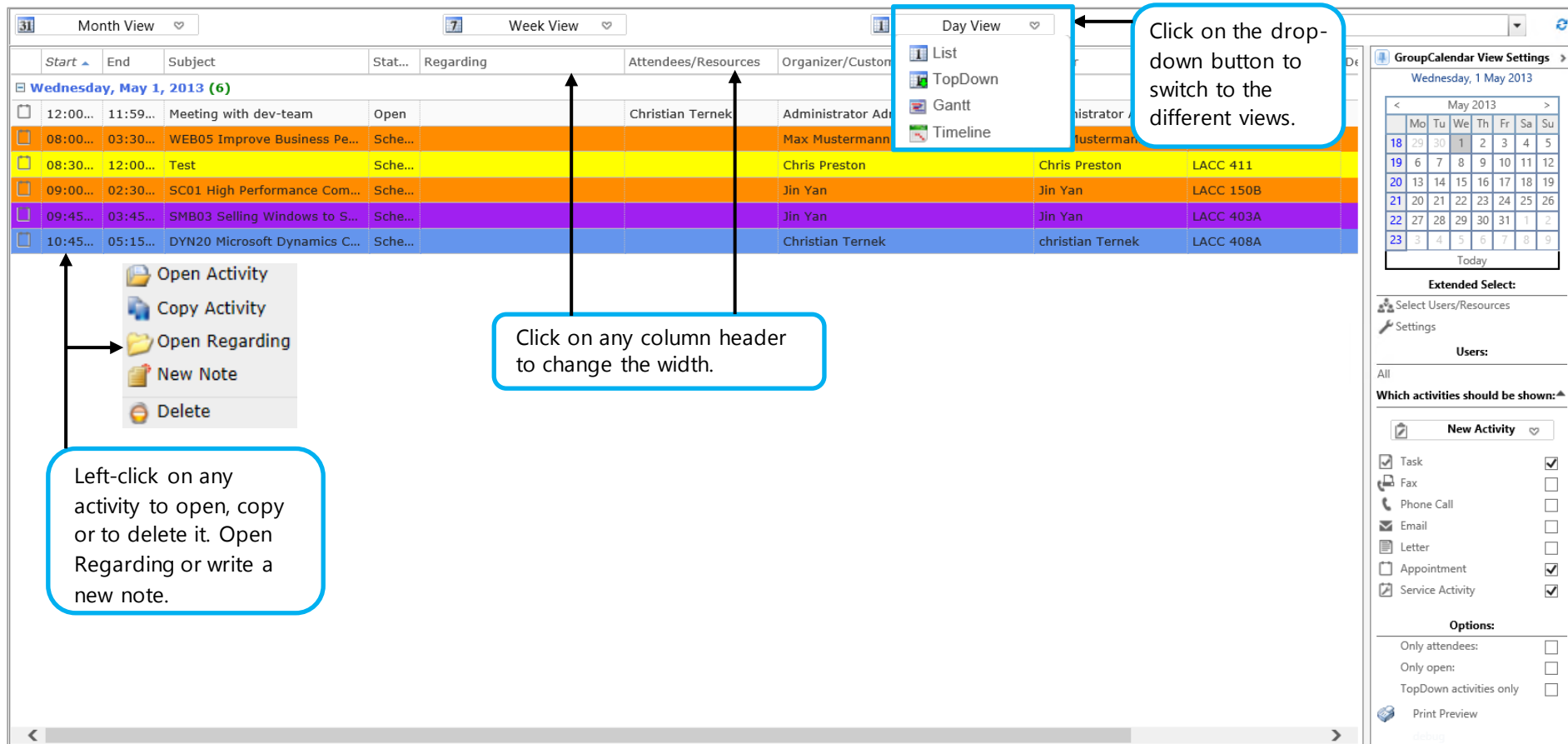
Callouts provide the following instructions:

- Click on any column header to sort the records in an ascending, or descending listing.** (Points to the 'Subject' column header)
- Click on the drop-down button to switch to the different views.** (Points to the 'Week View' dropdown menu which includes List, Gantt, and Timeline options)
- 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.** (Points to the '7' in the 'Week View' dropdown)
- Create a new or display different activities.** (Points to the 'New Activity' dropdown in the right sidebar)
- The number in the bracket shows the quantity of the activities.** (Points to the '(5)' in the 'Monday, April 29, 2013 (5)' header)

The right sidebar contains the 'GroupCalendar View Settings' panel, which includes a calendar navigation, 'Extended Select' options for users/resources, and a list of activity types to be shown (Task, Fax, Phone Call, Email, Letter, Appointment, Service Activity) with checkboxes. There are also 'Options' for filtering by attendees and open status, and a 'Print Preview' button.

## 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)



Month View | Week View | Day View

Start	End	Subject	Stat...	Regarding	Attendees/Resources	Organizer/Custom
<b>Wednesday, May 1, 2013 (6)</b>						
12:00...	11:59...	Meeting with dev-team	Open		Christian Ternek	Administrator Ad...
08:00...	03:30...	WEB05 Improve Business Pe...	Sche...			Max Mustermann
08:30...	12:00...	Test	Sche...		Chris Preston	Chris Preston
09:00...	02:30...	SC01 High Performance Com...	Sche...		Jin Yan	Jin Yan
09:45...	03:45...	SMB03 Selling Windows to S...	Sche...		Jin Yan	Jin Yan
10:45...	05:15...	DYN20 Microsoft Dynamics C...	Sche...		Christian Ternek	christian Ternek

View dropdown: List, TopDown, Gantt, Timeline

Context menu: Open Activity, Copy Activity, Open Regarding, New Note, Delete

GroupCalendar View Settings: Wednesday, 1 May 2013

Extended Select: Select Users/Resources, Settings

Users: All

Which activities should be shown: New Activity

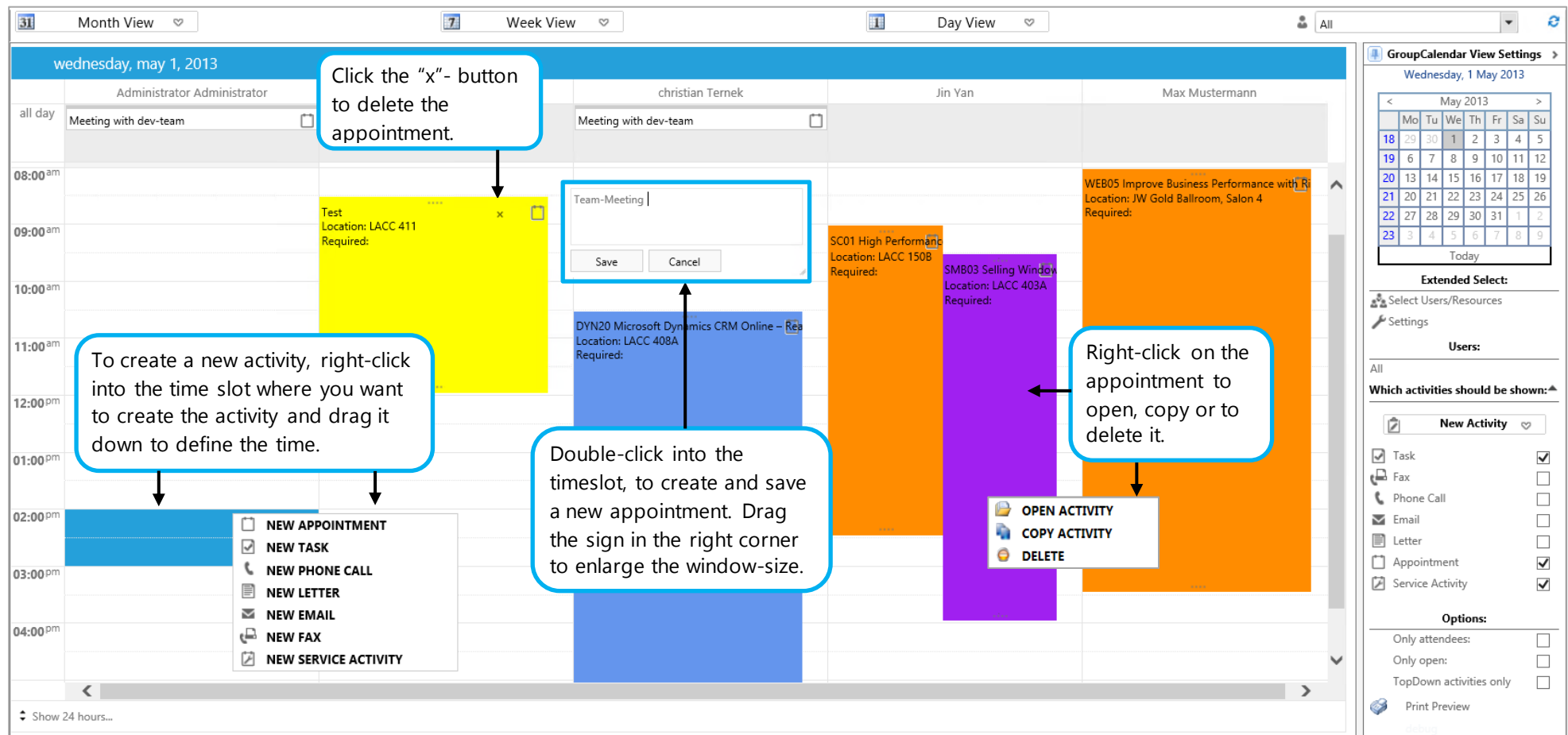
Options: Only attendees, Only open, TopDown activities only, Print Preview

Callouts:

- Click on the drop-down button to switch to the different views.
- Click on any column header to change the width.
- Left-click on any activity to open, copy or to delete it. Open Regarding or write a new note.

## 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 Wednesday, May 1, 2013. The calendar is organized by user: Administrator Administrator, christian Ternek, Jin Yan, and Max Mustermann. Various appointments are visible, such as 'Meeting with dev-team', 'Test', 'Team-Meeting', 'DYN20 Microsoft Dynamics CRM Online', 'SC01 High Performance', 'SMB03 Selling Window', and 'WEB05 Improve Business Performance with R'. A 'GroupCalendar View Settings' panel is open on the right, showing a calendar grid for May 2013 and options for 'Which activities should be shown' and 'Options'.

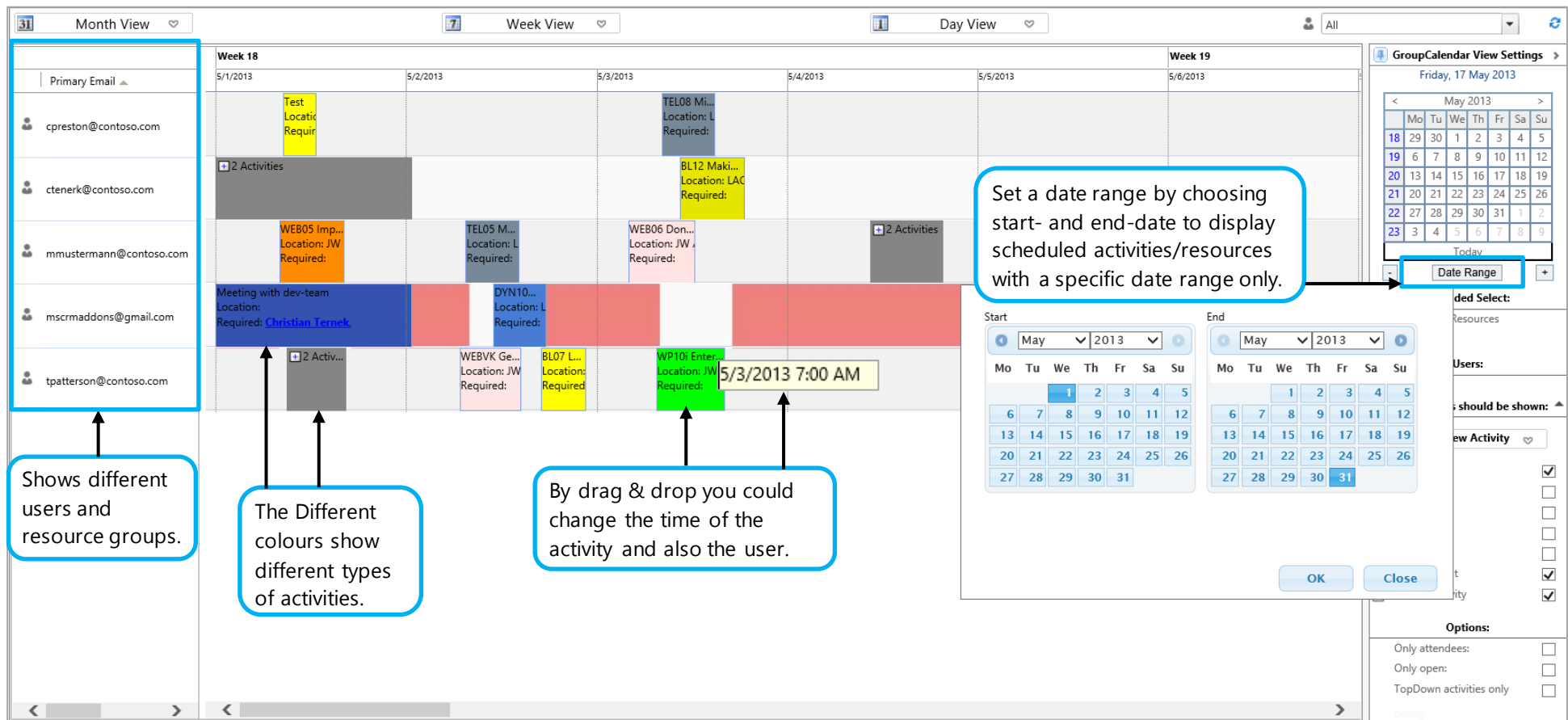
Instructional callouts are present:

- Click the "x"- button to delete the appointment.** (Points to the 'x' icon on a yellow appointment.)
- To create a new activity, right-click into the time slot where you want to create the activity and drag it down to define the time.** (Points to a time slot between 02:00pm and 03:00pm.)
- Double-click into the timeslot, to create and save a new appointment. Drag the sign in the right corner to enlarge the window-size.** (Points to a blue appointment.)
- Right-click on the appointment to open, copy or to delete it.** (Points to an orange appointment.)

A context menu is visible at the bottom left, listing options: NEW APPOINTMENT, NEW TASK, NEW PHONE CALL, NEW LETTER, NEW EMAIL, NEW FAX, and NEW SERVICE ACTIVITY. Another context menu is visible over an orange appointment, listing: OPEN ACTIVITY, COPY ACTIVITY, and DELETE.

## 9 Gantt View

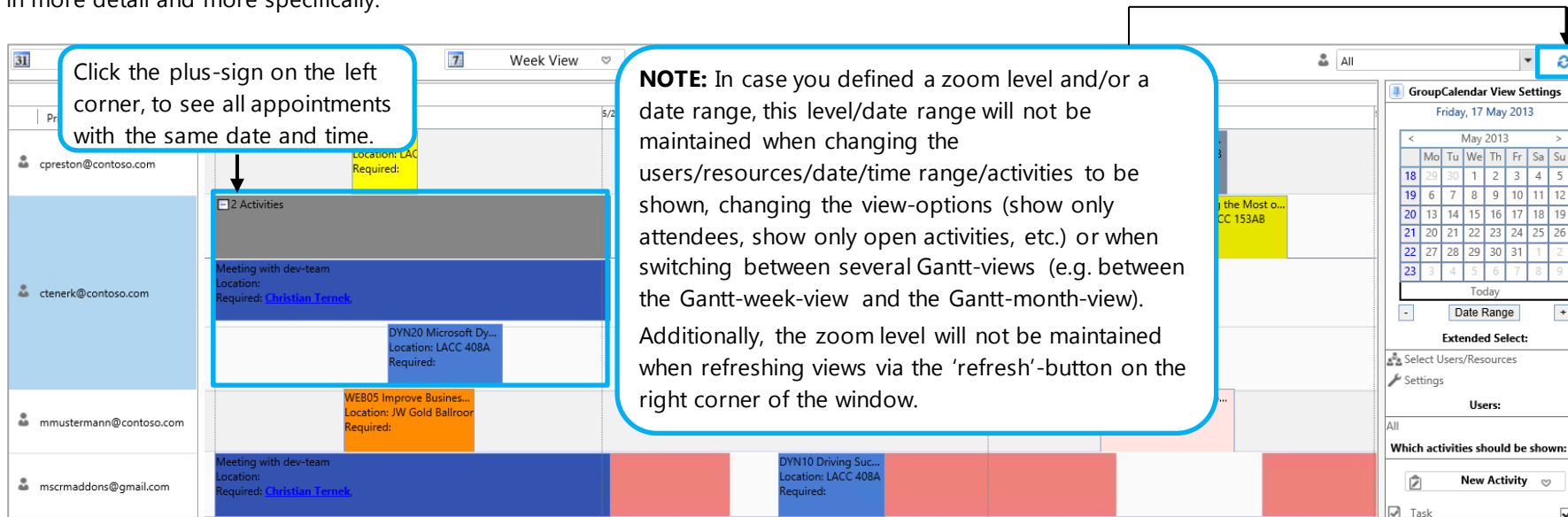
In the Gantt View, you have to click the plus-sign to see all appointments with the same date and time. All appointments and activities are displayed independent of their duration, meaning that longer appointments, activities are displayed with a longer bar and shorter with shorter ones. GroupCalendars 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 Week 18 (May 1-6, 2013) and Week 19 (May 6-12, 2013). The chart is organized into rows by user/resource and columns by date. Activities are represented by colored bars of varying lengths and colors (yellow, blue, orange, red, green, grey). A callout box on the left points to the user list on the far left, stating: "Shows different users and resource groups." Another callout box points to the colored bars, stating: "The Different colours show different types of activities." A third callout box points to a specific activity bar, stating: "By drag & drop you could change the time of the activity and also the user." On the right side, there is a "GroupCalendar View Settings" panel. A callout box points to the "Date Range" field in this panel, stating: "Set a date range by choosing start- and end-date to display scheduled activities/resources with a specific date range only." Below this, there are two calendar pickers for "Start" and "End" dates, both set to May 2013. The "Date Range" field is currently empty. The "Options" section at the bottom right includes checkboxes for "Only attendees:", "Only open:", and "TopDown activities only".

## 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.



Click the plus-sign on the left corner, to see all appointments with the same date and time.

**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.

GroupCalendar View Settings  
Friday, 17 May 2013

May 2013

Mo	Tu	We	Th	Fr	Sa	Su
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Today

Date Range

Extended Select:

Select Users/Resources

Settings

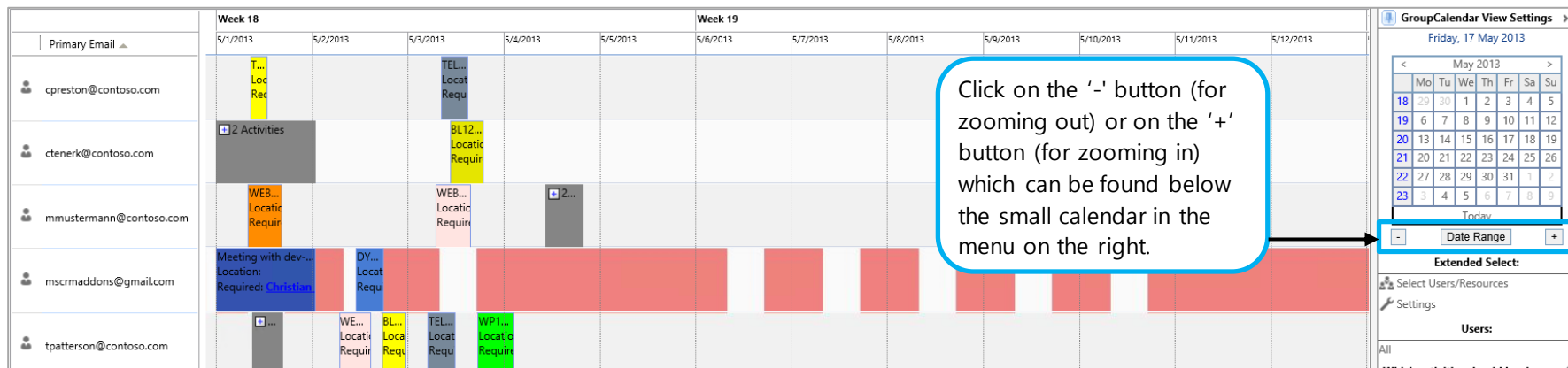
Users:

All

Which activities should be shown:

New Activity

Task



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.

GroupCalendar View Settings  
Friday, 17 May 2013

May 2013

Mo	Tu	We	Th	Fr	Sa	Su
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Today

- Date Range +

Extended Select:

Select Users/Resources

Settings

Users:

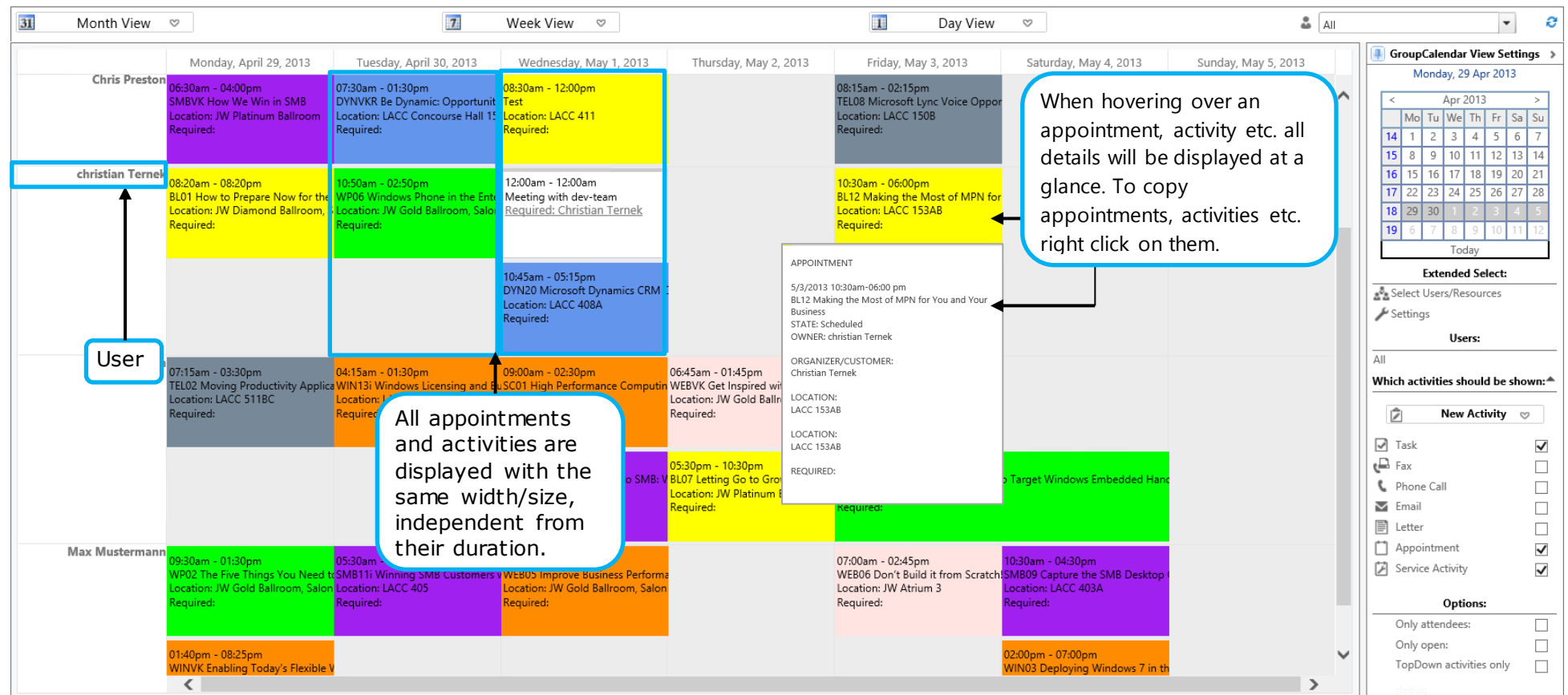
All

Which activities should be shown:



## 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 interface in Timeline View. At the top, there are navigation tabs for 'Month View', 'Week View', and 'Day View'. The main area shows a grid of appointments for users 'Chris Preston', 'christian Ternek', and 'Max Mustermann' from Monday, April 29, 2013, to Sunday, May 5, 2013. Each appointment is represented by a colored bar with its time, title, location, and required attendees. A callout box points to the 'christian Ternek' user name, and another points to a specific appointment, 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 points to the uniform width of the appointment bars, stating: 'All appointments and activities are displayed with the same width/size, independent from their duration.' On the right side, there is a 'GroupCalendar View Settings' panel with a calendar navigation, 'Extended Select' options, and a list of activities to show (Task, Fax, Phone Call, Email, Letter, Appointment, Service Activity) with checkboxes. There are also 'Options' for 'Only attendees', 'Only open', and 'TopDown activities only'.

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## 11 Contact

If you have questions to the product send an Email to  
[support@mscrm-addons.com](mailto:support@mscrm-addons.com)

or visit our blog

<http://blogs.mscrm-addons.com>

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