My Workplace User Guide

Microsoft Dynamics CRM 2011 compatible

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c360 My Workplace

Overview

c360 My Workplace is a Microsoft CRM enhancement that provides CRM users with an improved CRM workplace screen which allows users to:

- Personally select which columns (activity and/or case fields) they would like to see in the Queue grid and configure default sort order
- Specify a default start up view, selecting between user/team queues or organizational queues
- View items in other user and team queues (where security permissions allow)
- Immediately see a count of items in each queue without clicking on the queue
- Toggle between user, team and queue view with a single click
- Can filter the grid to see only activities, only cases, or both
- Print or export queue items to Microsoft Excel

Accessing My Workplace

My Workplace, pictured in Figure 1, can be accessed from two places within the Microsoft CRM web client; the left navigation bar and the c360 Tools menu. When My Workplace is accessed from the left navigation bar, it is displayed in the same window within Microsoft CRM. If you access My Workplace through the c360 Tools menu, it is displayed in a separate window, allowing you to run it independently of Microsoft CRM.

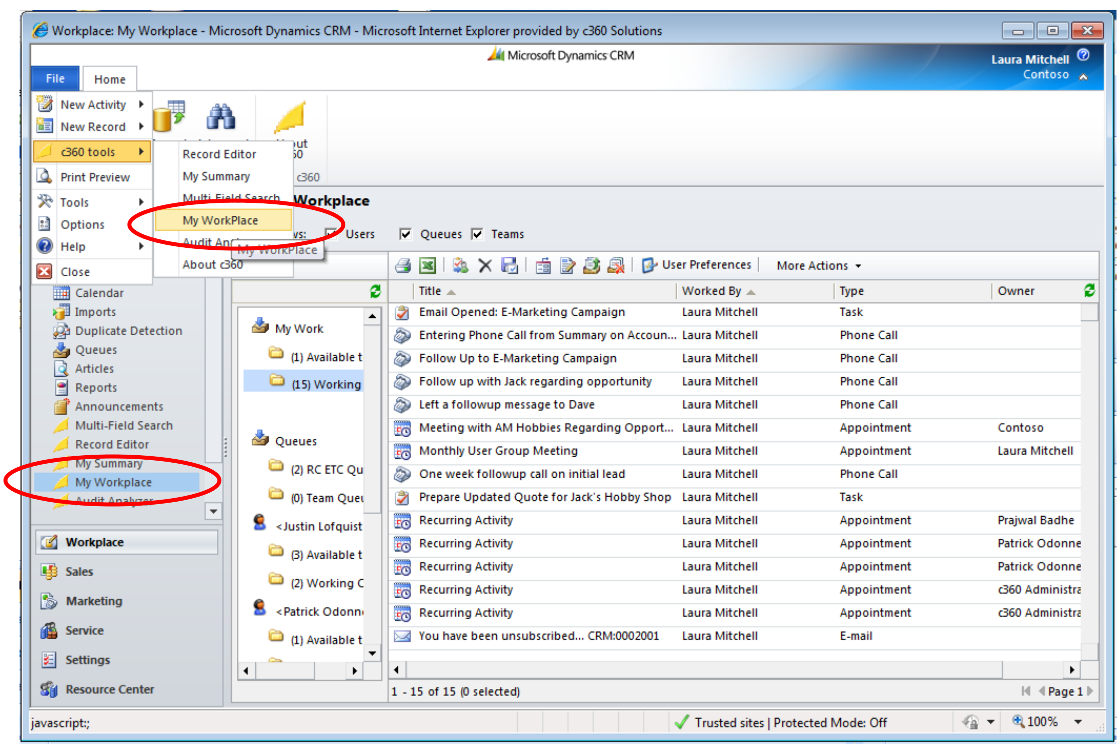


Figure 1: Accessing My Workplace

Default View

When My Workplace is accessed for the first time, it displays the default settings. Customize what is displayed by clicking **'User Preferences'**.
This is illustrated in Figure 2.

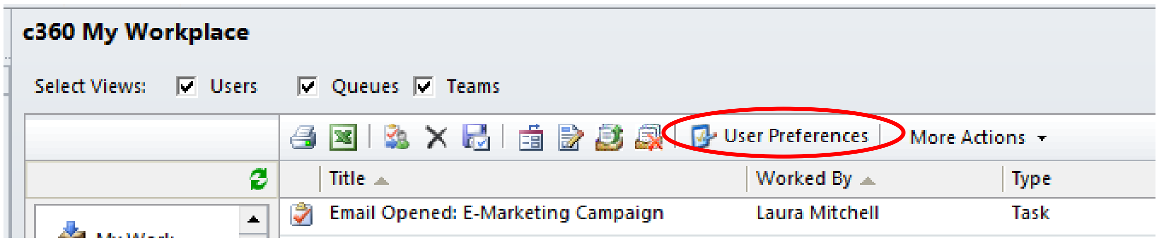
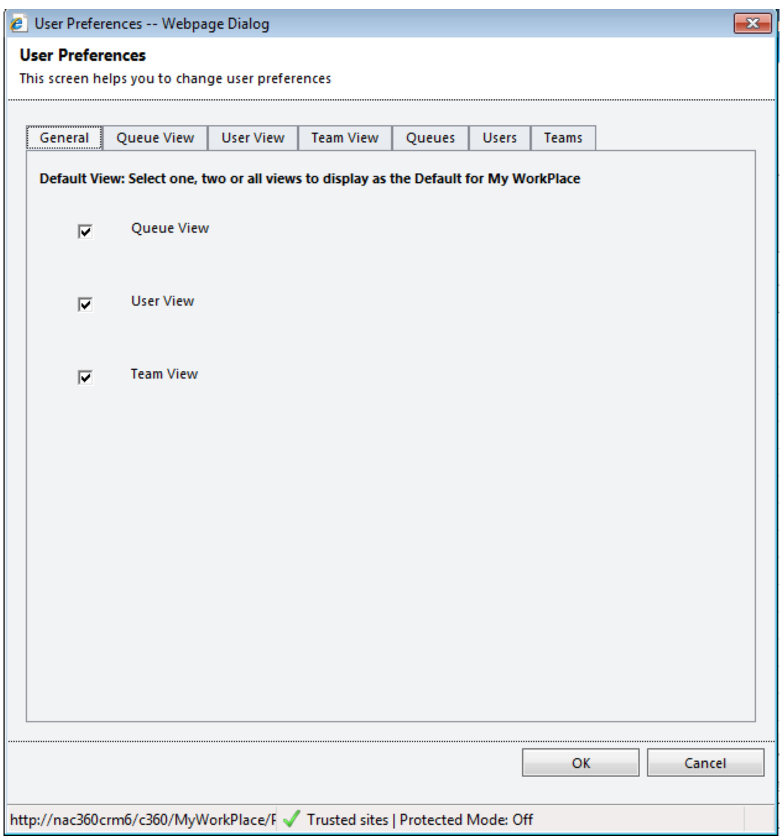


Figure 2: My Workplace default view

Setting User Preferences

General Tab



Queue View
Choosing this option will set your default view to display Organizational Queues.

User View
Your default view will display users' personal queues.

Team View
Your default view will display teams' personal queues.

Figure 3: Setting user's Default View

Queue, User and Team View Tabs

The Queue View and User View tabs allow you to choose which columns you wish to see in your queue grids.

Select an entity from the dropdown and check **'Include Entity in My Workplace'** The attributes for the selected entity will display in the 'Entity Attributes' box. Use the arrows to move fields to **'All Selected Attributes'**.
Choose the order of the columns using the **'Move Up'** and **'Move Down'** buttons.
Set the default sort field and the direction using the 'Sort Field' and 'Sort Order' picklists.

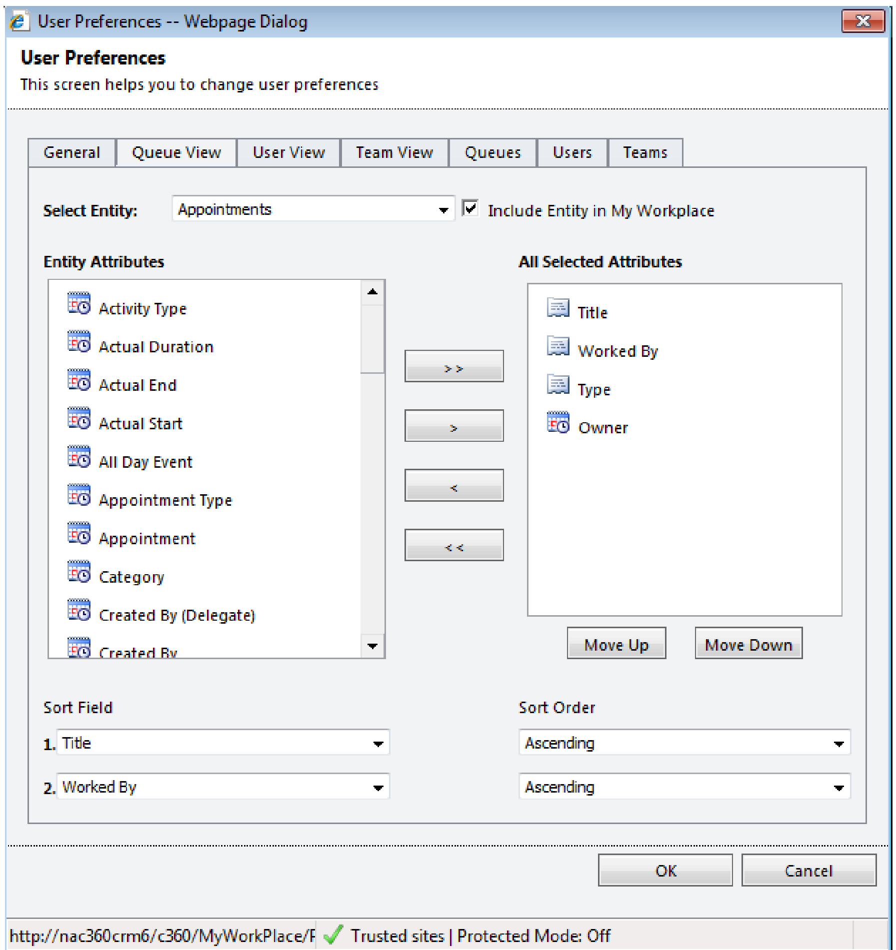


Figure 4: Choose which columns are displayed on the Queue, User and Team View

Queue, User and Team Tabs

Use the arrows to select which organizational queues, team and user queues you wish to see.

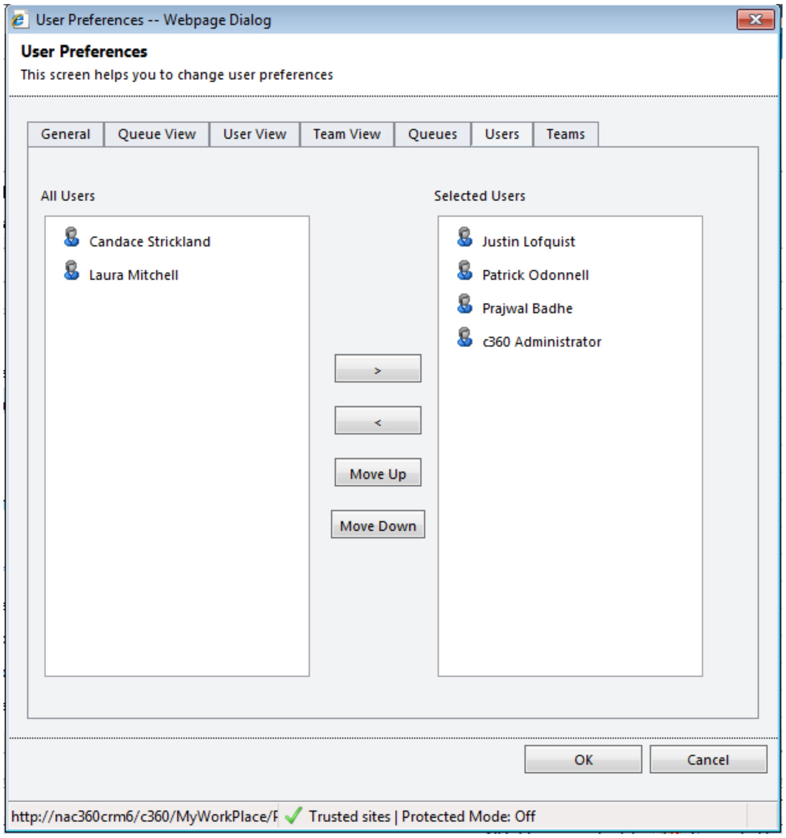


Figure 5: Choose which Queues you wish to display

Working in My Workplace

Queues are holding containers for work that needs to be completed. My Workplace allows you to view and interact with queues and their items with a user-friendly, single visual tool. There is no need to drill down because all the information is presented in the same place. Support supervisors can easily see what different users and teams are working on and what issues need to be addressed. It also allows them to tailor the view to how they work.

Menu Bar

Route, work on, assign, and release items from the queue from the menu bar at the top of My Workplace.

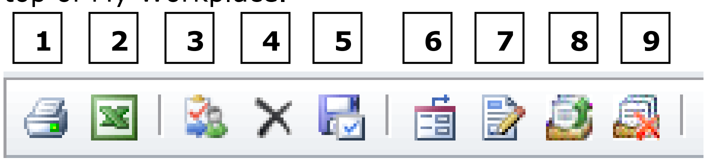


Figure 8: My Workplace Menu bar

1) Print	Create a printable list of the highlighted area in My Workplace.
2) Export to Excel	Export a file to Excel.
3) Assign	Transfer ownership of the item to another user or team. Places in the User or Team's 'Available to Work On' section.
4) Delete**	Delete the highlighted item from CRM.
5) Save as Complete	Save one or many highlighted activities as complete.
6) Route	Place the item in another user/team's queue and/or re-assign ownership. Clicking the 'Route' icon calls the CRM dialog for routing items.
7) Work On	Designate that you or another user/team are 'Working On' this item in the queue. Clicking the 'Work On' icon calls the CRM dialog for 'Working On' items. This does not affect ownership or what queue this item resides in.
8) Release	Highlight an item in the 'Working On' bucket and return it to 'Available to Work on' status. Clicking the 'Release' icon calls the CRM dialog to 'Release' the item from being worked on.
9) Remove**	Remove this item from queues. Clicking on the 'Remove' icon will call the CRM dialog to remove the item from queues but the item will still exist in CRM.

Note: My Workplace honors CRM security, in that a person that does not have permissions to an activity will be able to see the activity listed but will receive an accessed denied error when attempting to open it by double-clicking on the row.

**If the Delete and Remove Icons appear to be incorrect in your environment, please apply the following patch.

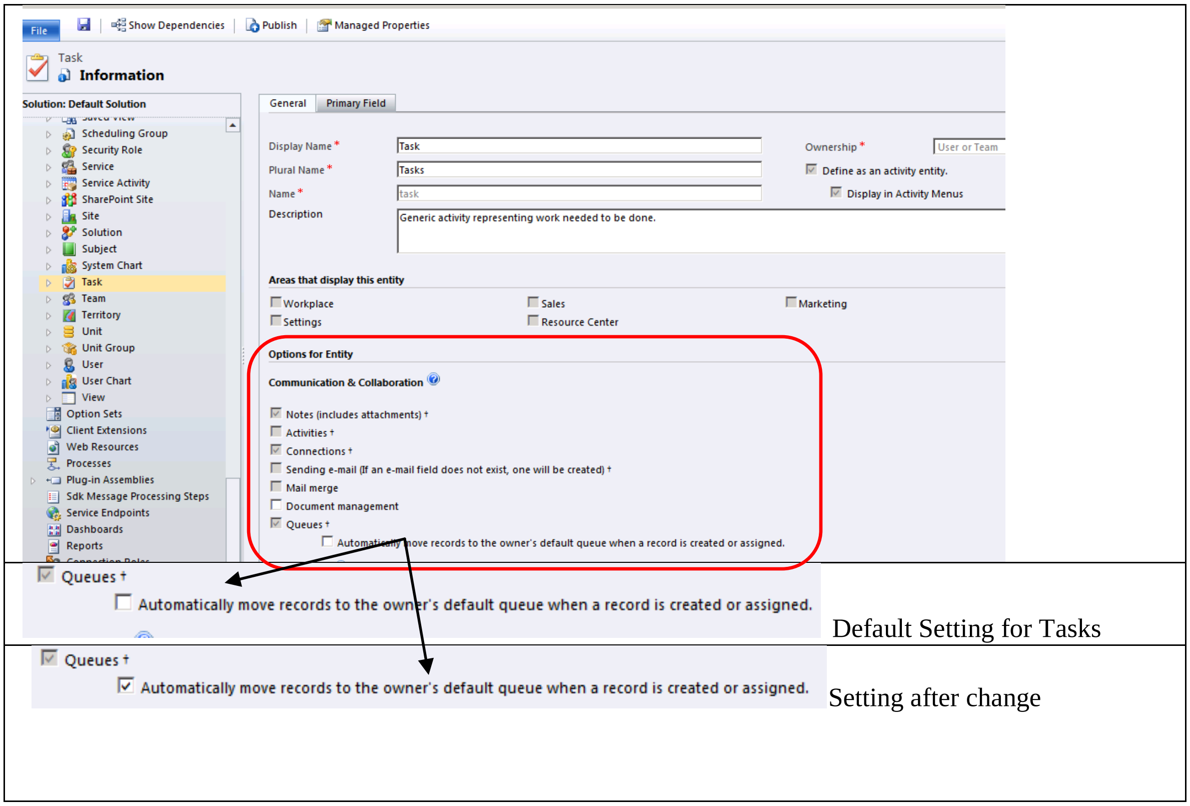
Categorization of Items in My Workplace

There are four pieces of information that determine where they are categorized in My Workplace:

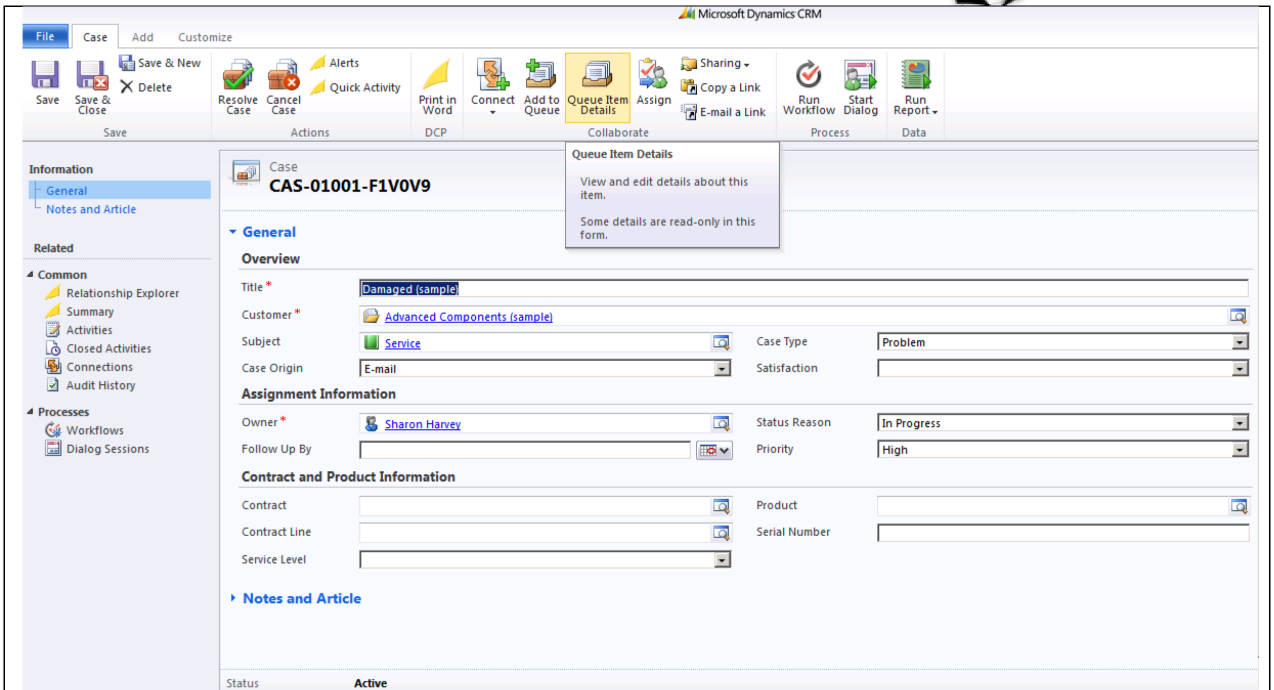
- **Worked By:** the person who is actually focused on this item and working on it. If blank, the item is in a queue, 'Available to Work On'

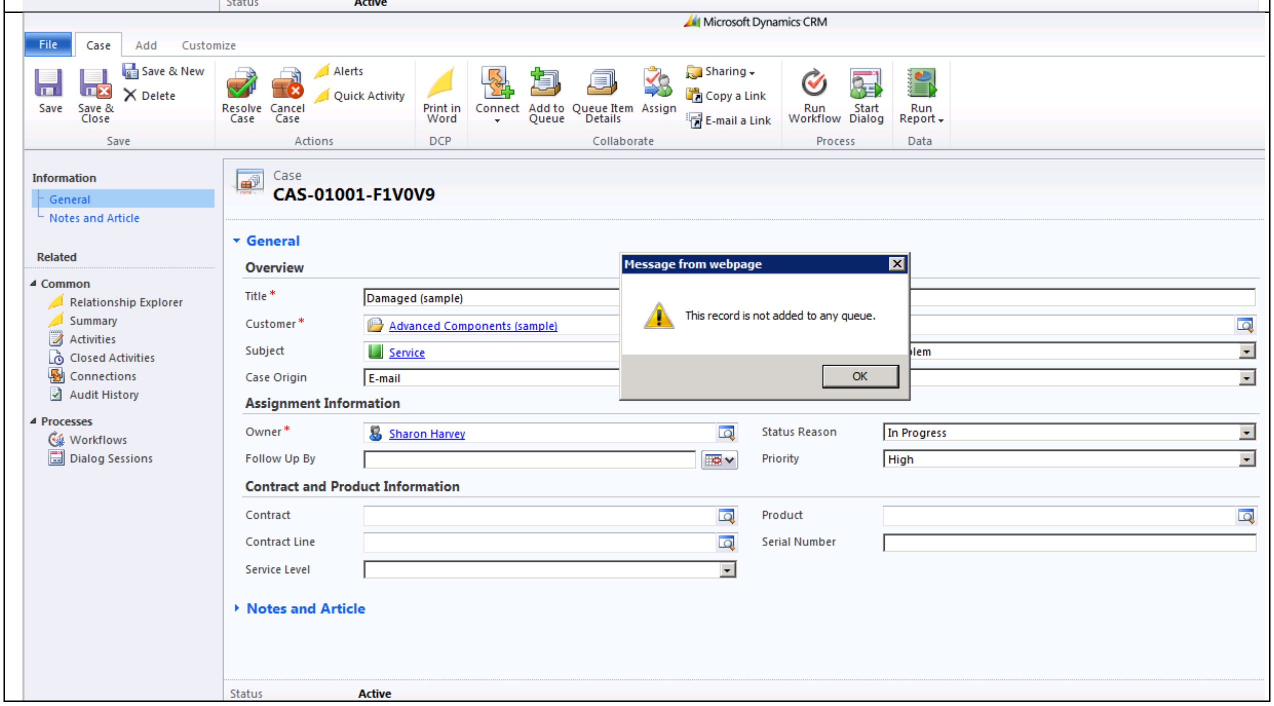
- **Queue:** the holding container that the activity or case has been routed to. This item stays constant, regardless of what user or team is working on the item

- **Owner:** In CRM 4.0 items were automatically placed in the owners queue. This is not the case in CRM 2011. However you can have the CRM administration change the settings for an entity so it automatically appears in the owner queue when created or assigned.



- **Queue Item Status:** Because items are no longer automatically assigned to owner's queues they are not automatically considered Queue Items. Without automatic assignment you have to assign an item to a queue manually to make it a Queue Item. If it's not a Queue Item My Workplace can't see it.





My Workplace handles Queue Items. The information being displayed by My Workplace can be verified in the Queue Item Detail record.

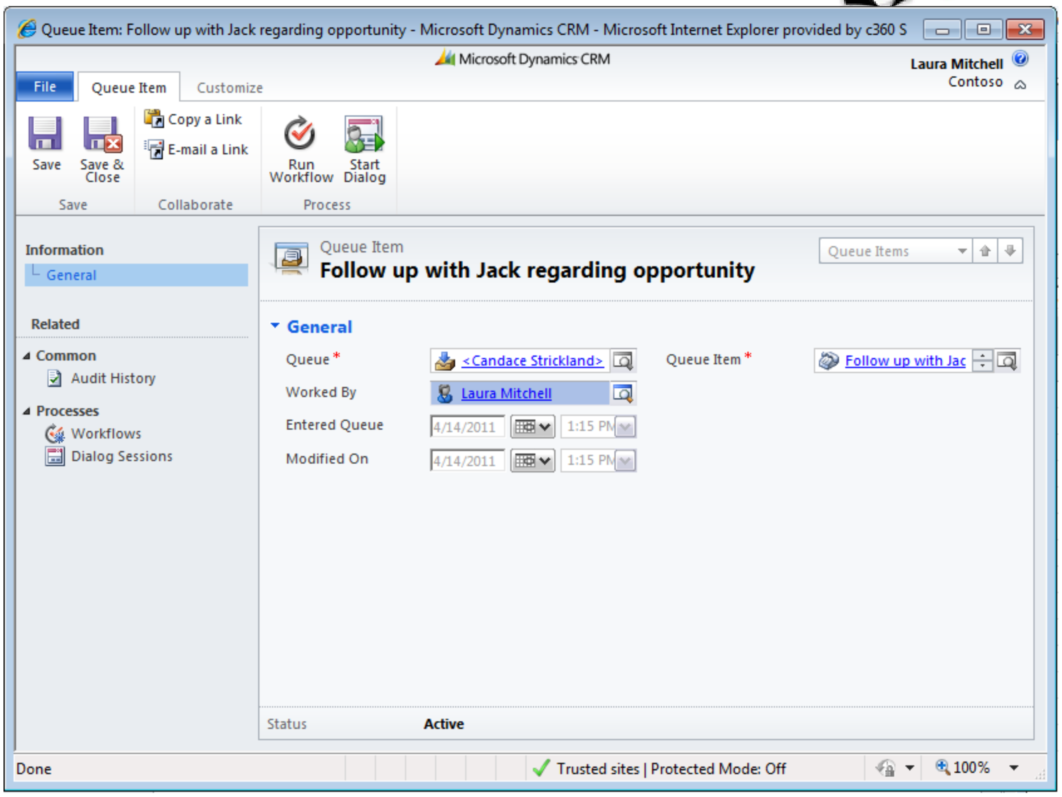
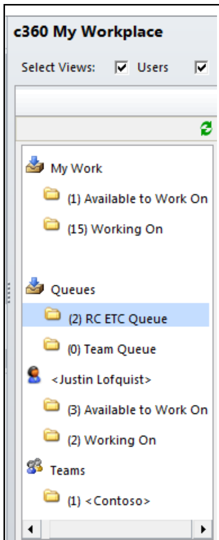


Figure 6: Queue item detail for an item in a queue

Note in the example above that the item is in Candace Strickland's queue but is being worked by Laura Mitchell.

My Workplace checks the Queue Item Detail record and categorizes the items as follows:



CATEGORY	**QUEUE**	**WORKING ON**
My Work		
Available to Work On	Logged in User's Queue	BLANK
Working On	ANY	Logged in User
User		
Available to Work On	Labeled Users's Queue	BLANK
Working On	ANY	Labeled user
Queue	Total all items in labeled Queue	N/A
Team	Total all items in labeled Team's Queue	N/A

The categorization method in CRM allows for flexibility in handling different work processes.

For example:

1. 'Laura Mitchell' creates a task to mail collateral to a prospect. She then
2. Clicks **'Route'** to routes the task to the 'Marketing Distribution Team' queue. The task now appears in that team's queue
3. Jamie Hardwick sees the task in the 'Marketing Distribution Team' queue and decides to fulfill the task. He highlights the task and clicks **'Work On'.** The task now appears in his **'Working On'** category under **'My Work'** in My Workplace. His supervisor can see this under the **'User'** view as well
4. Once he has completed his portion of the task, he can:
    a. Mark the task as complete, ending the process
    b. Route it to another queue for mailing so it appears in their queue area
    c. Give it to another user or team to 'Work On' so it appears in their **'Working On'** bucket

Toggling Between User View and Queue View

Regardless of your User Preferences, you can toggle different views on and off to more easily view the data you want to deal with.

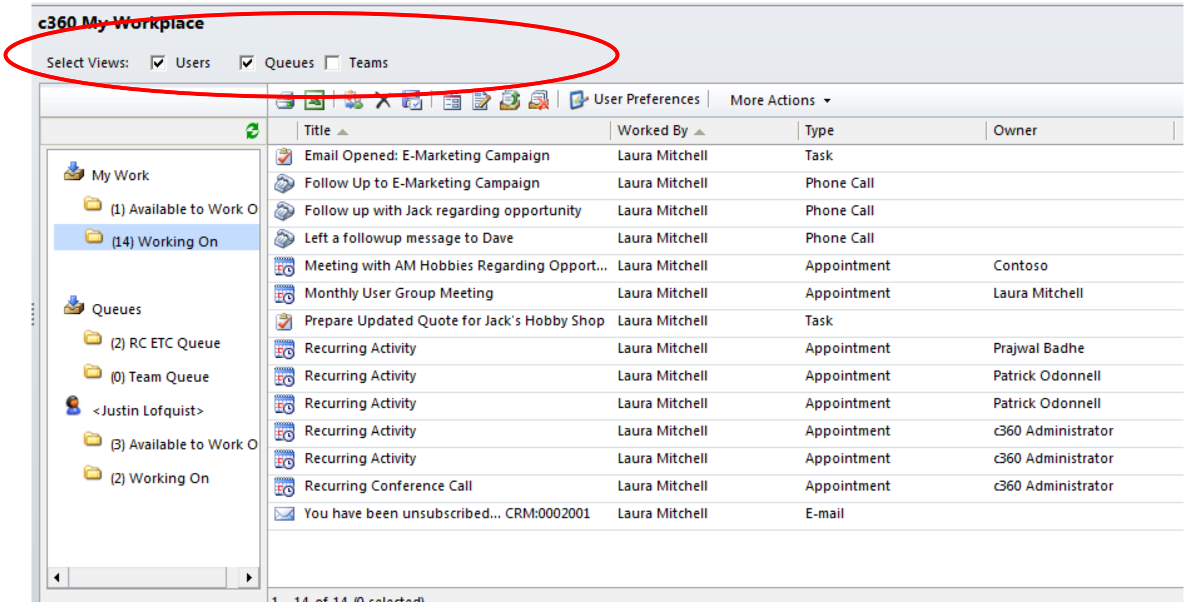


Figure 8: Toggling between User, Queue and Team Views

In the scenario above, User and Queues have been selected. Check the 'Teams' box to add the team queues to the left side of My Workplace.

Printing Queue Items

You can print all items in a queue by clicking the printer icon in the upper right-hand corner of the queue grid. This will display a web page with the items in a printable format, and will then launch your print dialog box.

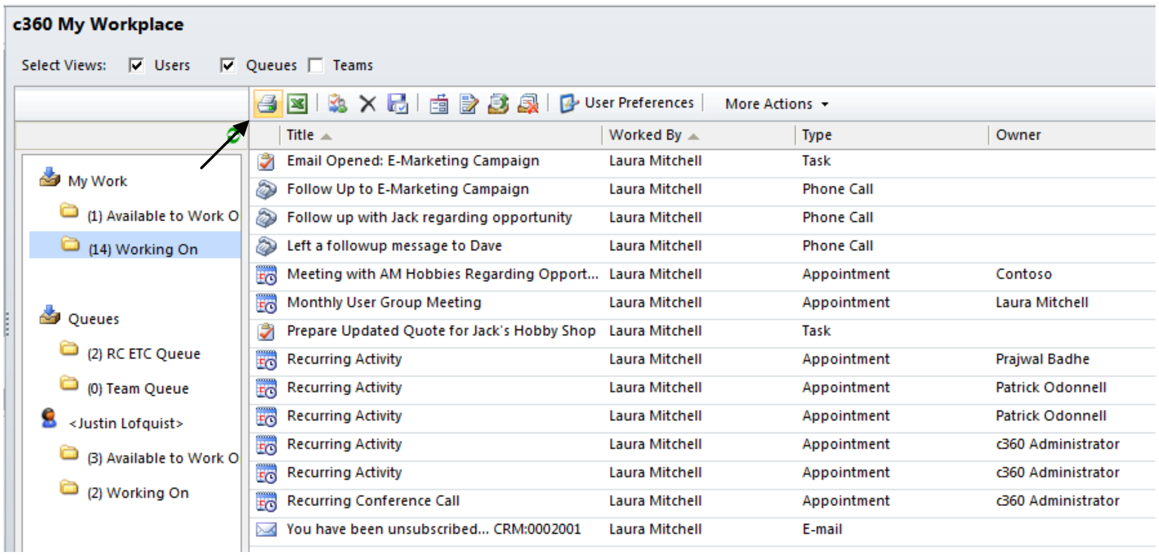
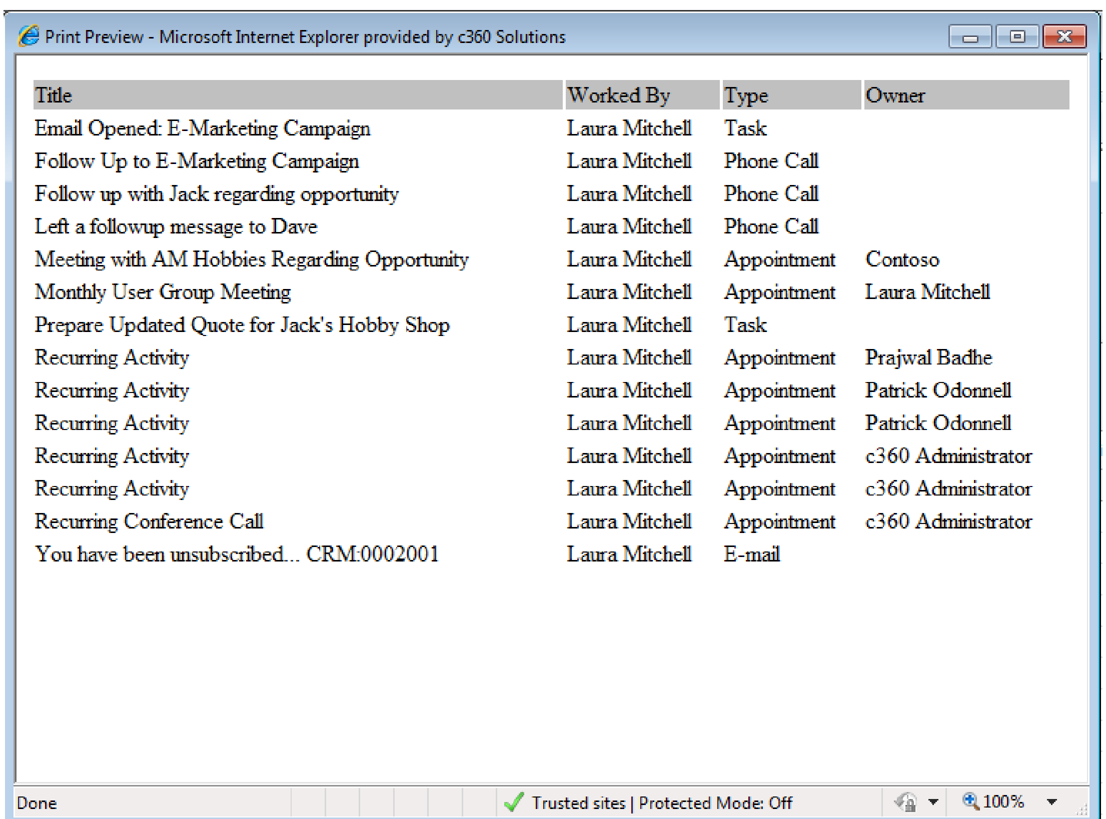


Figure 9: Printer icon



Title	Worked By	Type	Owner
Email Opened: E-Marketing Campaign	Laura Mitchell	Task	
Follow Up to E-Marketing Campaign	Laura Mitchell	Phone Call	
Follow up with Jack regarding opportunity	Laura Mitchell	Phone Call	
Left a followup message to Dave	Laura Mitchell	Phone Call	
Meeting with AM Hobbies Regarding Opportunity	Laura Mitchell	Appointment	Contoso
Monthly User Group Meeting	Laura Mitchell	Appointment	Laura Mitchell
Prepare Updated Quote for Jack's Hobby Shop	Laura Mitchell	Task	
Recurring Activity	Laura Mitchell	Appointment	Prajwal Badhe
Recurring Activity	Laura Mitchell	Appointment	Patrick Odonnell
Recurring Activity	Laura Mitchell	Appointment	Patrick Odonnell
Recurring Activity	Laura Mitchell	Appointment	c360 Administrator
Recurring Activity	Laura Mitchell	Appointment	c360 Administrator
Recurring Conference Call	Laura Mitchell	Appointment	c360 Administrator
You have been unsubscribed... CRM:0002001	Laura Mitchell	E-mail	

Figure 10: Printable view of queue grid

Exporting Queue Items to Excel

You can also export queue items to Excel by clicking the Excel icon in the upper right-hand corner of the queue grid. You will be prompted to either open or save the Excel document.

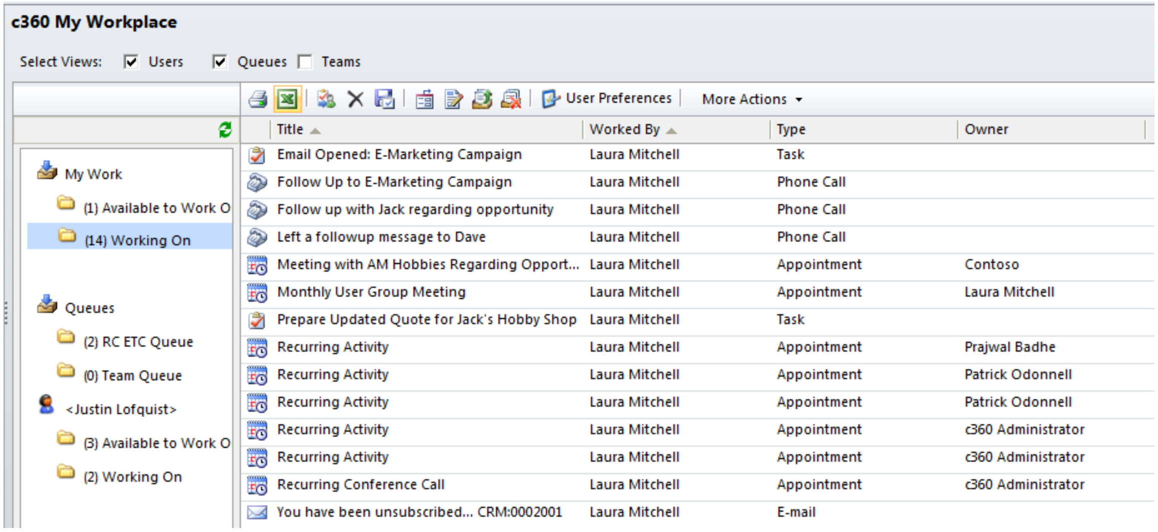


Figure 11: Excel icon

Shared Column Names

Three columns in My Workplace are shared across all entities:

- Title
- Workedy By
- Type

All other entity attributes selected will create a new column in My Workplace. If the information does not apply to that attribute, the column will be blank for that item.