



mscrm-addons.com
DocumentsCorePack
for Microsoft Dynamics CRM

GroupCalendar for MS CRM 2015/2016 and Microsoft Dynamics 365

April 2022

Installation Guide

(How to install/uninstall GroupCalendar for MS CRM 2015/2016 and MS Dynamics 365)

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Preamble

This documentation is intended to guide you through the installation of GroupCalendar in Microsoft Dynamics 365.

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 search queries with PowerSearch who have the following minimum skills:

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

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
- Microsoft Dynamics 365
- Microsoft Dynamics CRM Online

Purpose of GroupCalendar?

GroupCalendar facilitates – among other things – scheduling in Microsoft Dynamics 365. 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

1 How to install GroupCalendar for Microsoft Dynamics CRM 2015/2016 and Microsoft Dynamics 365

Because GroupCalendar (GC) can be installed and integrated in Microsoft Dynamics CRM on premise or online, there are two different ways to install our add-on:

Install GC in Microsoft Dynamics CRM ON PREMISE via .msi.file (SEE CHAPTER 1.1 HOW TO INSTALL GROUPCALENDAR VIA .MSI-FILE, PAGE 7)

Install GC in MS Dynamics 365 via AppSource (SEE CHAPTER 1.2 HOW TO INSTALL GROUPCALENDAR VIA APPSOURCE (DYNAMICS 365 ONLINE only), PAGE 17)

1.1 How to install GroupCalendar via .msi-file

Installing GroupCalendar via .msi-file import means that you have decided to go with a local installation. During the course of the chapter you will find detailed information on how to install the .msi-file correctly. Our starting point is the Download area at our homepage.

1.1.1 How to get the data required for the installation

To get the required data for the installation, login to our [Download Area](#).

Installer

Title	Category	Modified Date	Size	
GroupCalendar for MS CRM 2015 / CRM 2016	v2015.109	8/9/2016	37.19 MB	Download

Figure 1: GroupCalendar – Download .zip-file

GroupCalendar for Microsoft Dynamics CRM 2015/2016 and Microsoft Dynamics 365

Click on the **[Download]**-button and you will receive a file that contains all the required data for the installation.

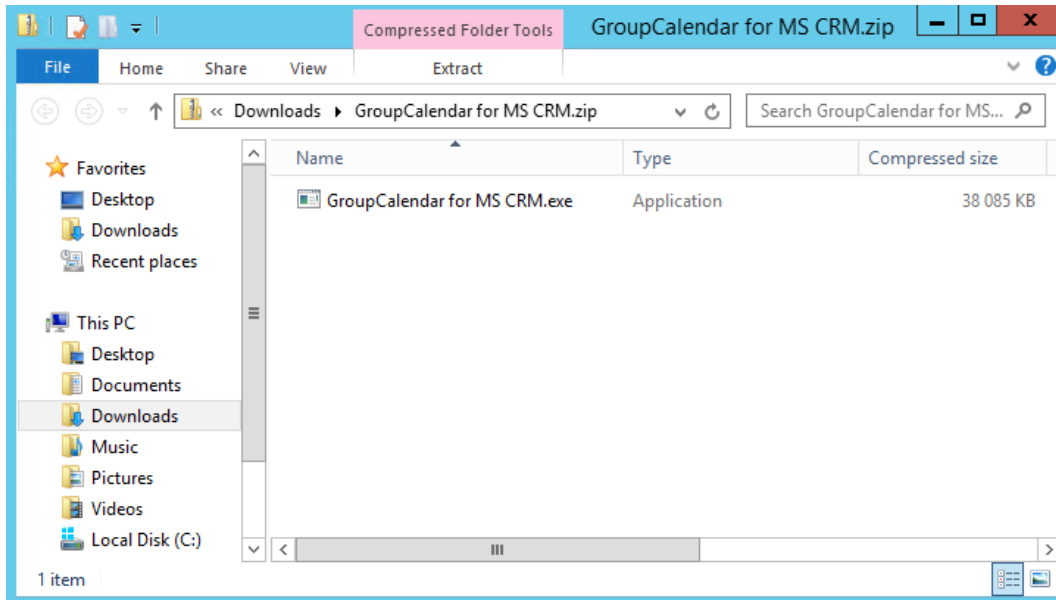


Figure 4: GroupCalendar for Microsoft CRM.exe

The file is the starting point for your installation if you use Dynamics 365 ON PREMISE. Double click on it in order to start the installation process.

1.1.2 How to import GroupCalendar with the .msi-files (via .exe installer)

To start the installation process, simply double-click on GroupCalendar for MS CRM.exe in your downloaded files. This action opens the GroupCalendar installation wizard. Click on the **[Next]**-button to proceed.

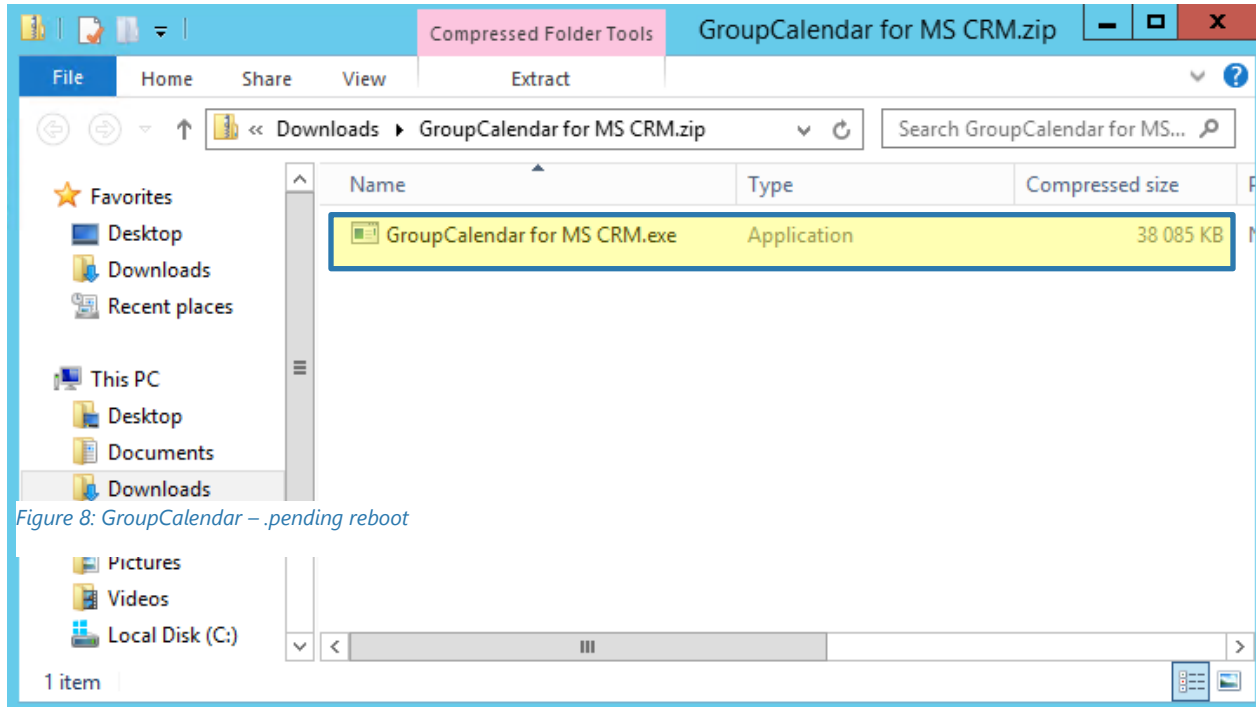


Figure 8: GroupCalendar – .pending reboot

Figure 6: GroupCalendar – .exe Installer

Sometimes it can happen that the question box displayed in figure 4 appears. If so, simply click on the **[OK]**-button in order to continue with the installation. The required restart can be done after the installation as well.

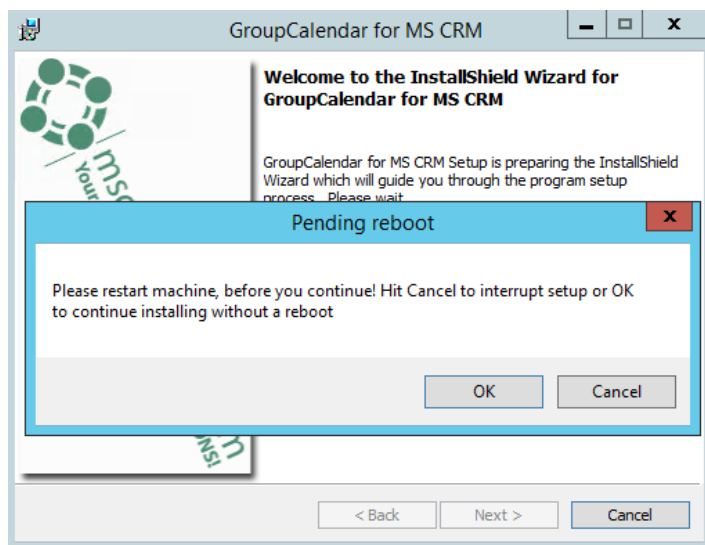


Figure 7: GroupCalendar – .pending reboot

However, click on the **[Next>]**-button to proceed.

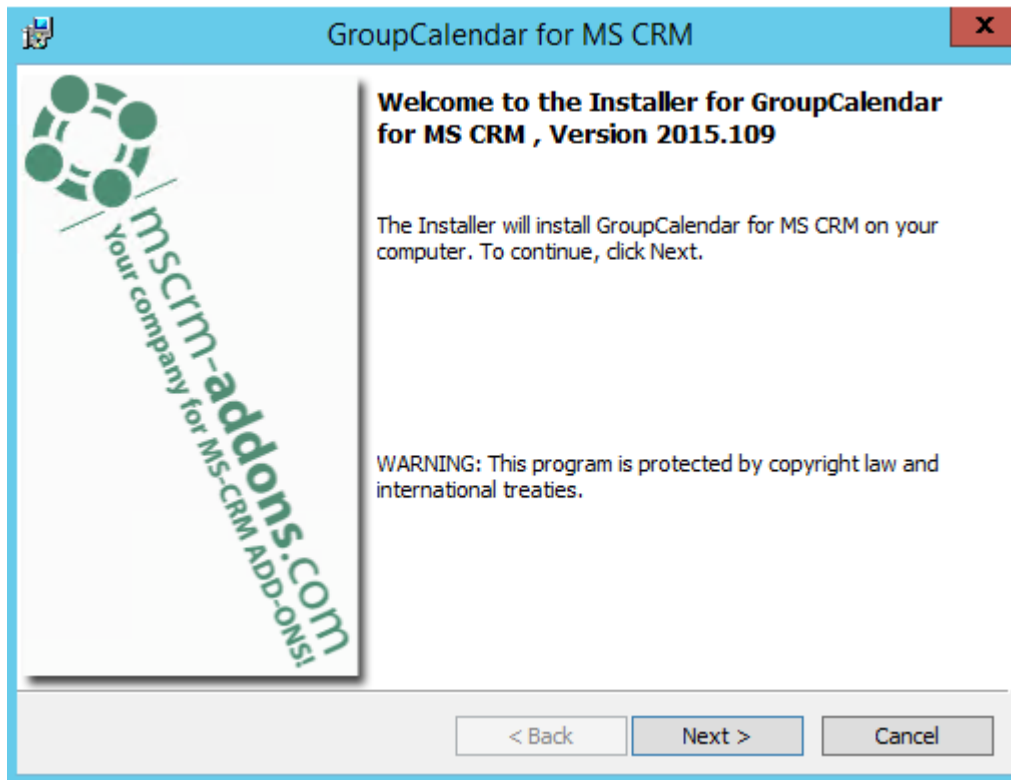


Figure 6: GroupCalendar – Installation wizard

Next, the EULA (End User License Agreement) opens. Read the license agreement carefully and accept its terms if you agree to them. If you do not accept the license agreement, you cannot continue with the installation. Using the **[Print]**-button, you can also print it. Click on the **[Next>]**-button to proceed.

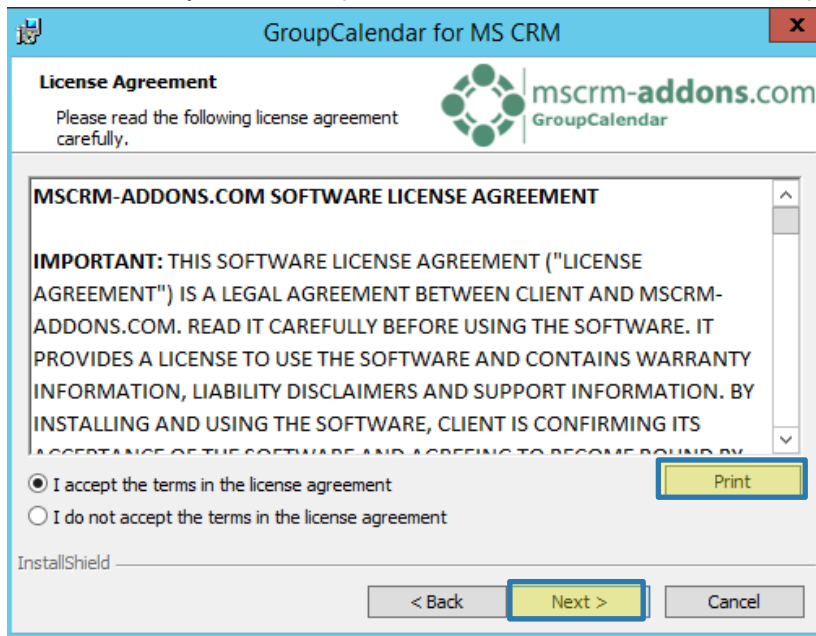


Figure 9: GroupCalendar – EULA (End User License Agreement)

If you want to, you could change the save location in the next window. Feel free to click on the **[Change...]**-button to use another save location for GroupCalendar. Click on the **[Next>]**-button to proceed.

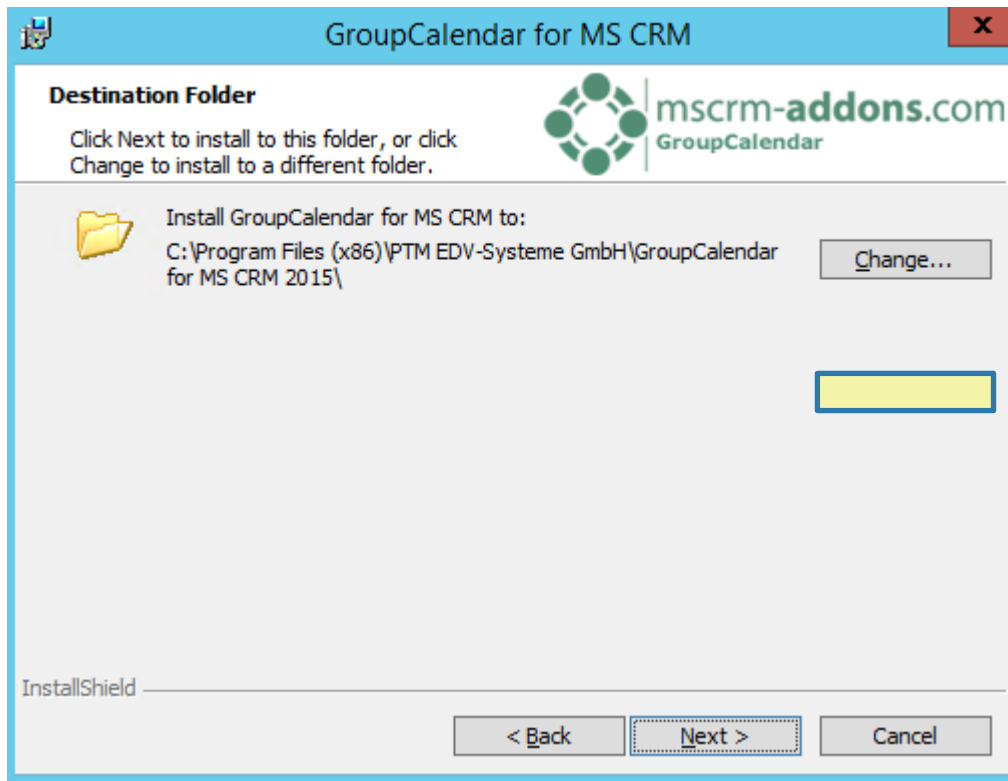


Figure 10: : GroupCalendar – Installer: Save location

The installer is ready to install the program now. To do so, simply click on the **[Install]**-button.

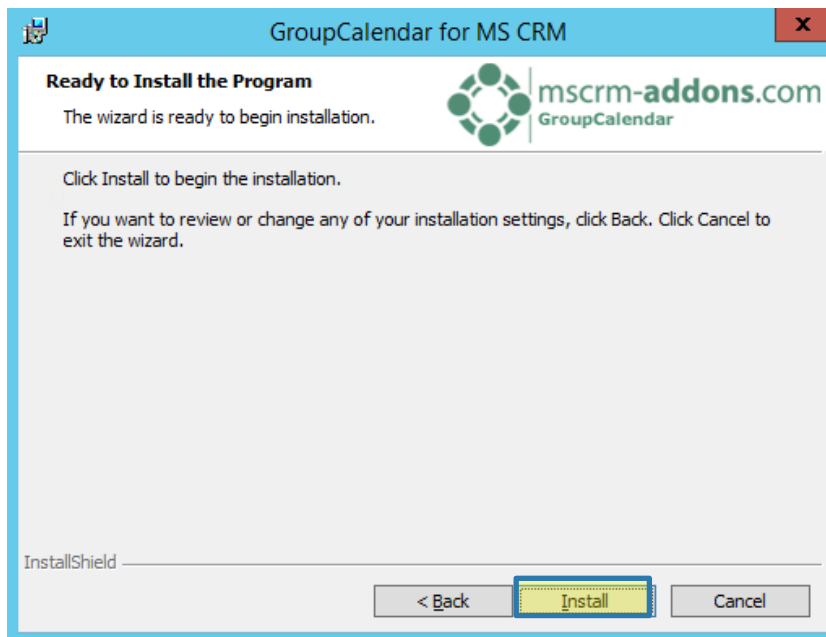


Figure 11: GroupCalendar – Installer ready to install



The installation can take a few minutes. Enjoy your coffee.

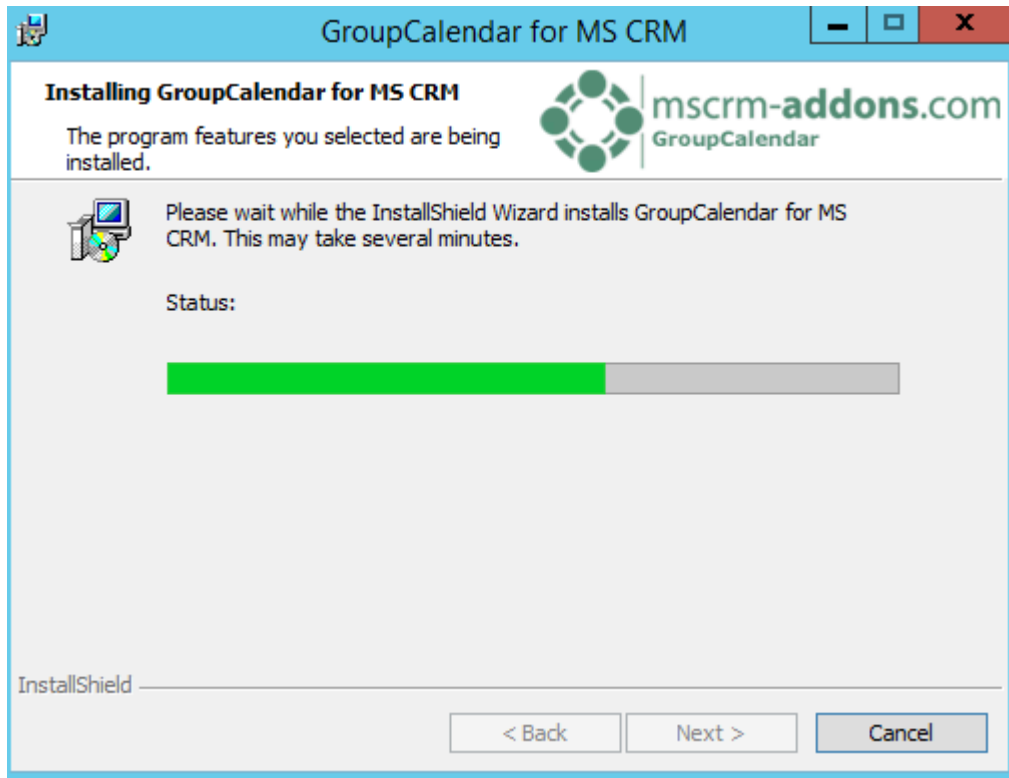


Figure 12: GroupCalendar – Installer: Install Shield Wizard

GroupCalendar .msi installer requires a connection to Microsoft Dynamics 365. To configure your server, select an existing profile or create a new profile in the *Connection Dialog*. Select your preferred server path and add your login credentials by filling in the field's username (1), password (3) and domain (2). Press the **[Retrieve all organizations]**-button and select your organization. For further information on the connection dialog, please have a look at the corresponding documentation, which you can find [here](#):

Press the **[OK]**-button in order to proceed.

Logon information

Welcome to your CRM Connection setup.
Please specify your connection details to connect to CRM. If you do not know the connection details, please contact your system administrator

CRM Connection | Advanced Settings | Log

Existing Profiles: [HKLM] crm:5555 - Standard [Manage]

Select your Crm Type:
 Standard (onPremise) IFD (Hosted) Crm Online

CRM Server-Url:
http:// crm:5555

Authenticated as:
 Use default Credential: crmtest0administrator

1 Username: administrator 2 Domain: crmtest0 3 Password: *****

Retrieve all Organizations

Organization information:

Friendly name	Unique name	ServiceURL
Standard	Standard	Standard
PTM EDV Systeme...	PTMEDVSystemeG...	PTMEDVSystemeGmbH
crm2016	crm2016	crm2016

Reset LiveID Cache [OK] [Cancel]

Figure 13: GroupCalendar – Connection Setup dialog

Next, you have to apply the general security role. The msrm-addons general security role contains the basic requirements for using the product itself and to be able to perform the license check.



You can skip this step, but please note that skipping this step requires you to manually assign the roles to all users.



Figure 14: GroupCalendar – security roles

Next, GroupCalendar will create a new website on your IIS 8. Please click on the **[OK]**-button in order to proceed.



The setup will try to configure your firewall to allow this port to be used from the client computers.

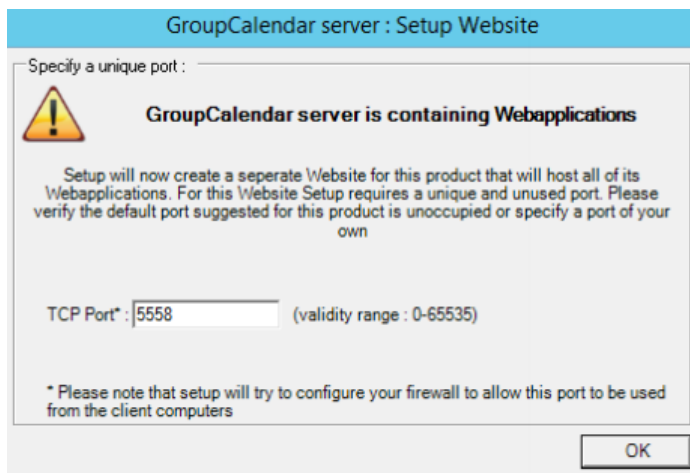


Figure 15: GroupCalendar – Setup Website

GroupCalendar will as well ask you to select a time format.

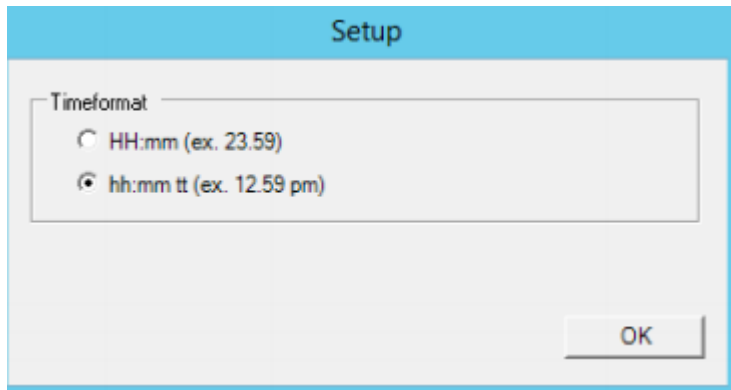


Figure 16: GroupCalendar – SetupTime

If everything was set up correctly, the Installation Wizard appears again on the screen. Click on the **[Finish]**-button in order to finish the installation.

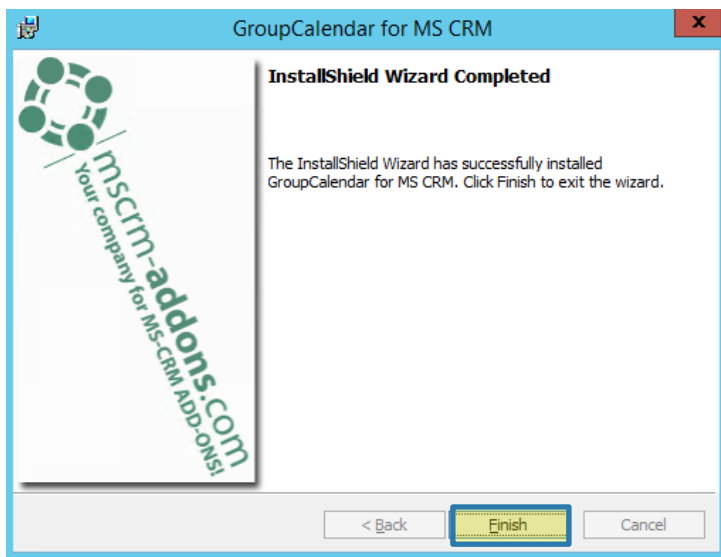


Figure 17: GroupCalendar – finish installation

The next window provides you with an organization overview. Again, the verification of the connection and the user rights can last a few minutes.

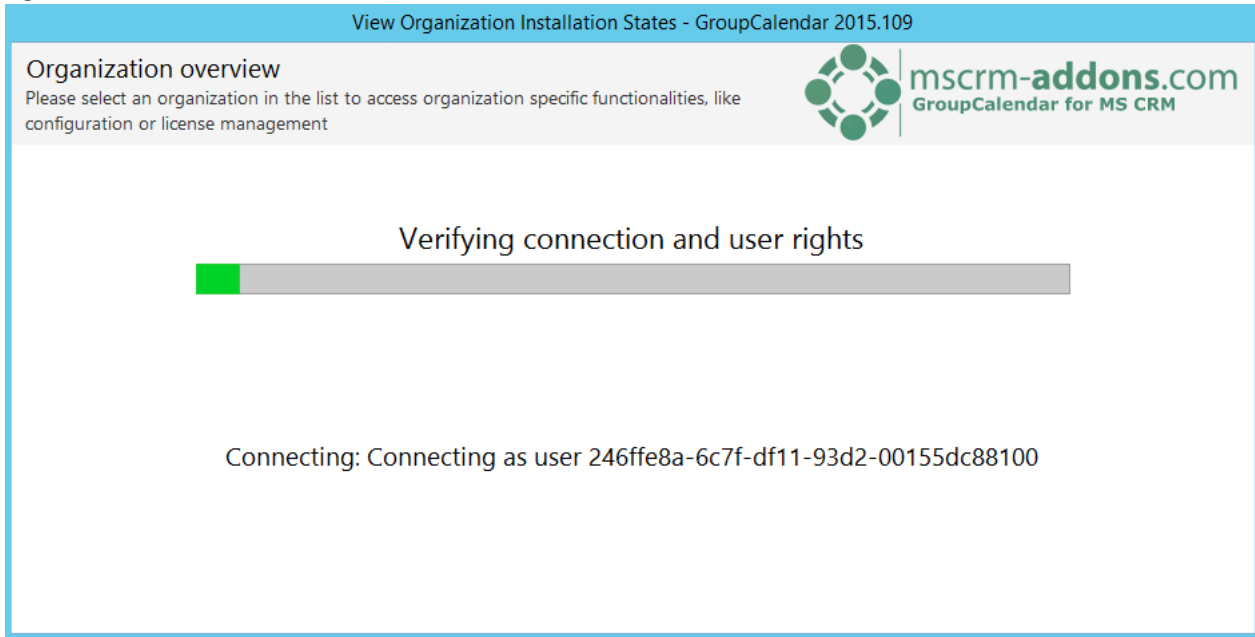


Figure 18: GroupCalendar – verifying connection and user rights

As soon as the connection is verified, the Organization overview will open and provide you with an overview of your organization(s).

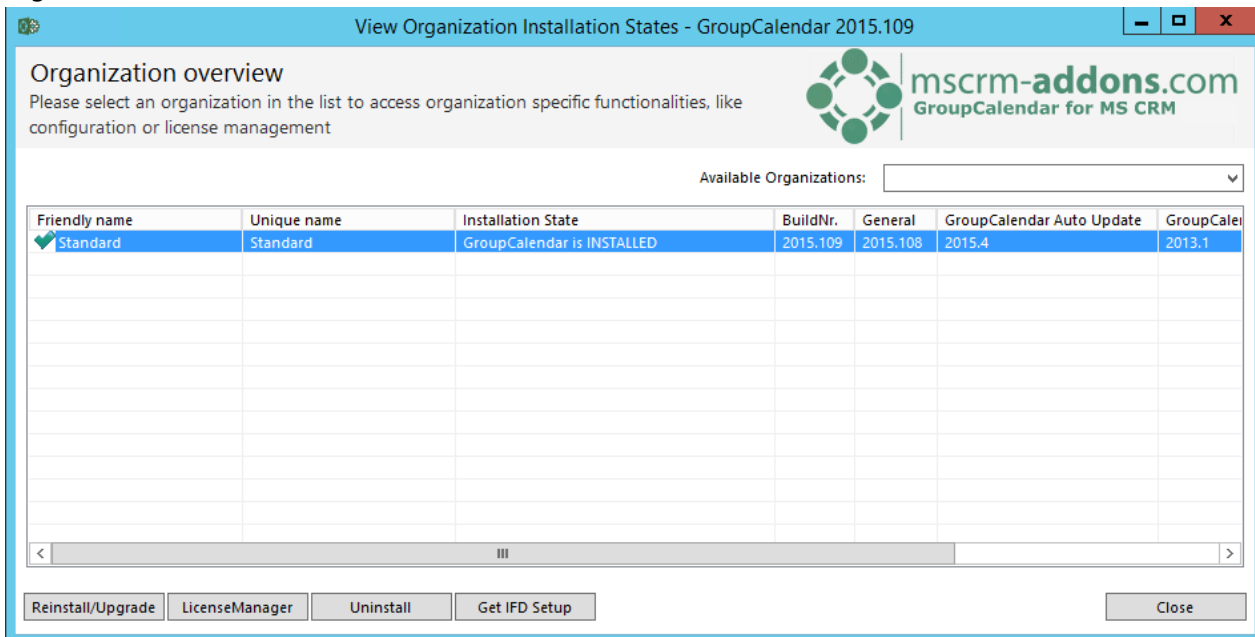


Figure 19: GroupCalendar – verifying connection and user rights

1.2 How to install GroupCalendar via AppSource (Dynamics 365 online only)

1.2.1 How to get started with AppSource

Open [AppSource](#).

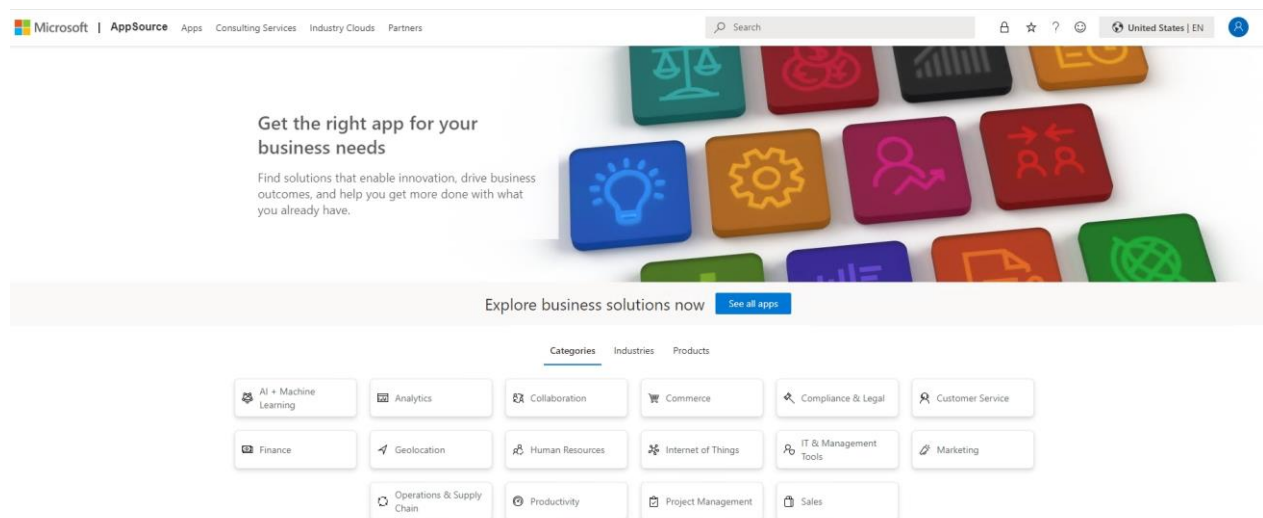


Figure 20: Microsoft App Source

Next, please look for *GroupCalendar* in the Search field and click on the **[Free trial]**-button in the *Group Calendar* result box.

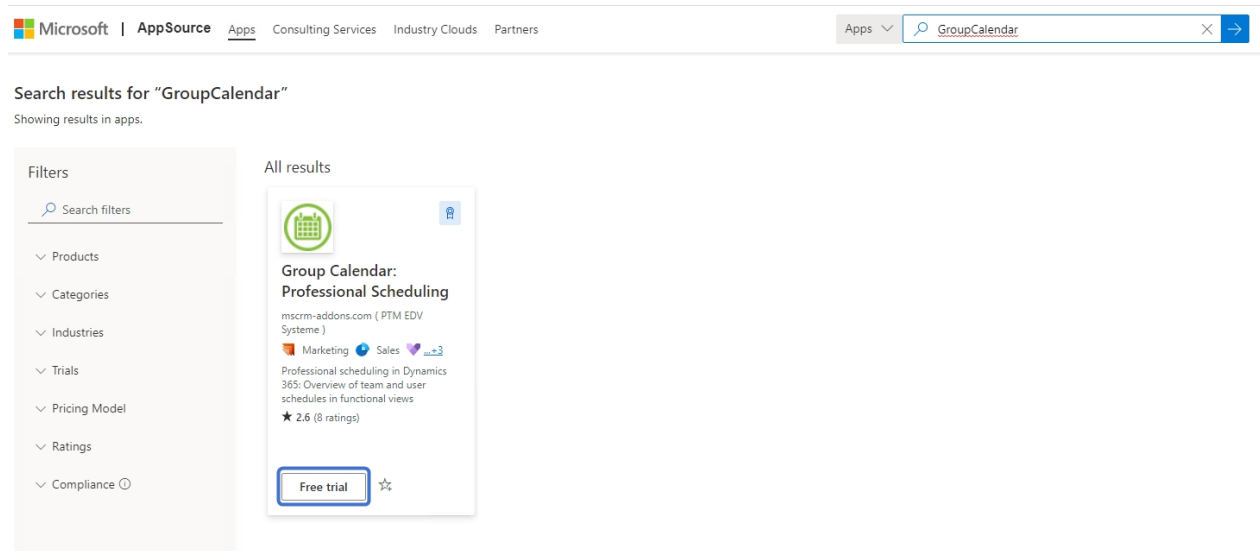


Figure 21: App Source - GroupCalendar

Next, agree to the Group Calendars terms and conditions and click on the **[Continue]**-button.

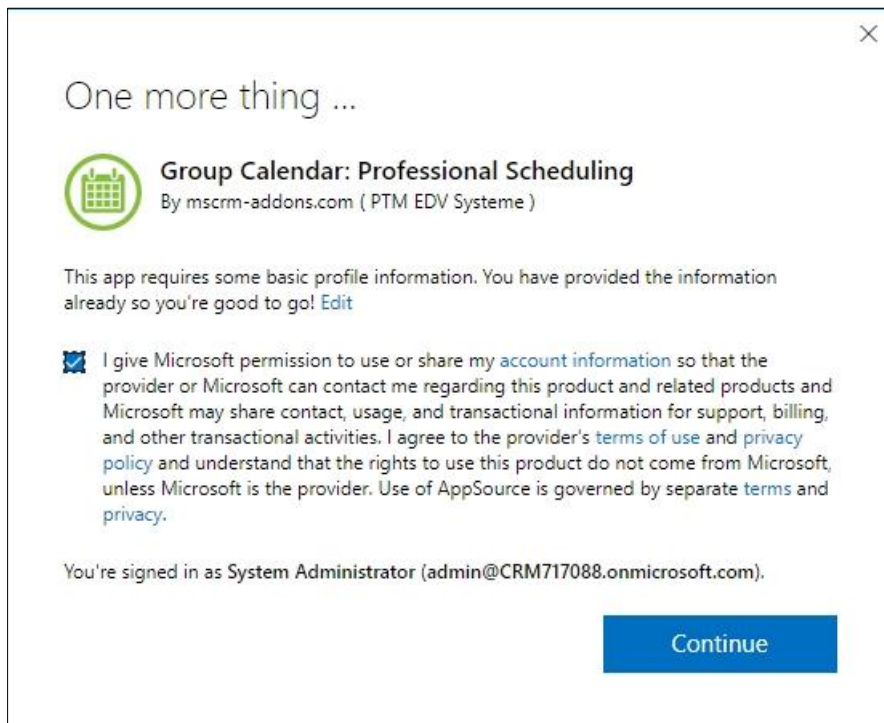


Figure 22: Terms and Conditions

You will be asked to sign into Microsoft AppSource.

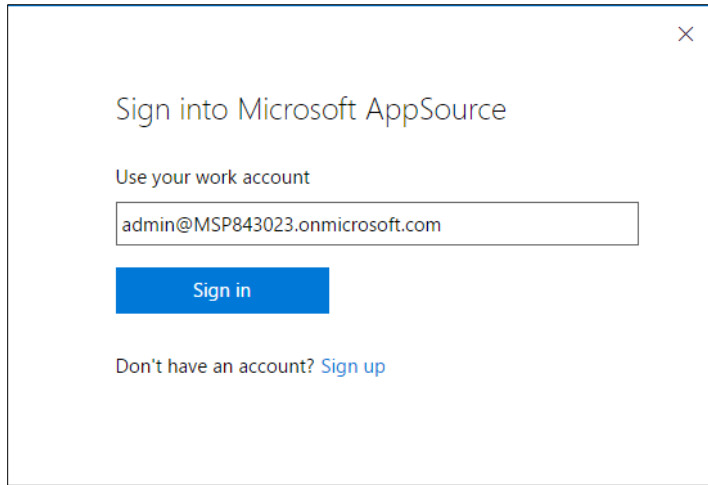



Figure 23: AppSource – Sign in

Once logged in, please add the application by agreeing to the terms and conditions and clicking on the **[I Agree]**-button if you want to proceed.

Install Group Calendar: Professional Scheduling ✕



Name
Group Calendar: Professional Scheduling

Description
Start your 14-days free trial today - all features & support included! No payment required! Scheduling teams is not always simple - to help you out, we created GroupCalendar. The solution provides multiple views including a GANTT-, Top-Down-...
[See more](#)

Publisher
mscrm-addons.com (PTM EDV Systeme)

Select an environment *

CRM122409 ▼

Don't see your environment?

I agree to Microsoft's Legal Terms and Privacy Statement

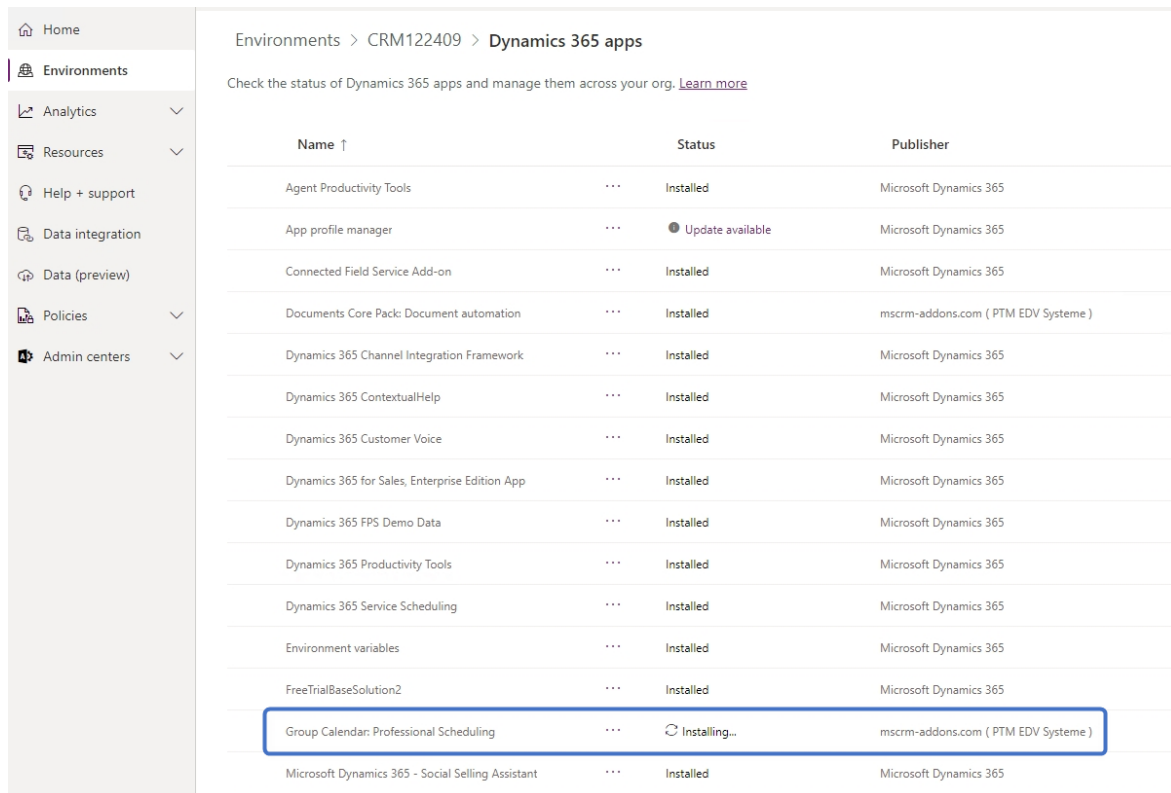
I agree to Privacy Statement and Legal Terms for importing packages into Dynamics 365

Install **Cancel**

Figure 24: AppSource – Add GroupCalendar Application

GroupCalendar for Microsoft Dynamics CRM 2015/2016 and Microsoft Dynamics 365

You are redirected to the Dynamics 365 Administration panel. Here, you get an overview of all your installations.



Environments > CRM122409 > Dynamics 365 apps

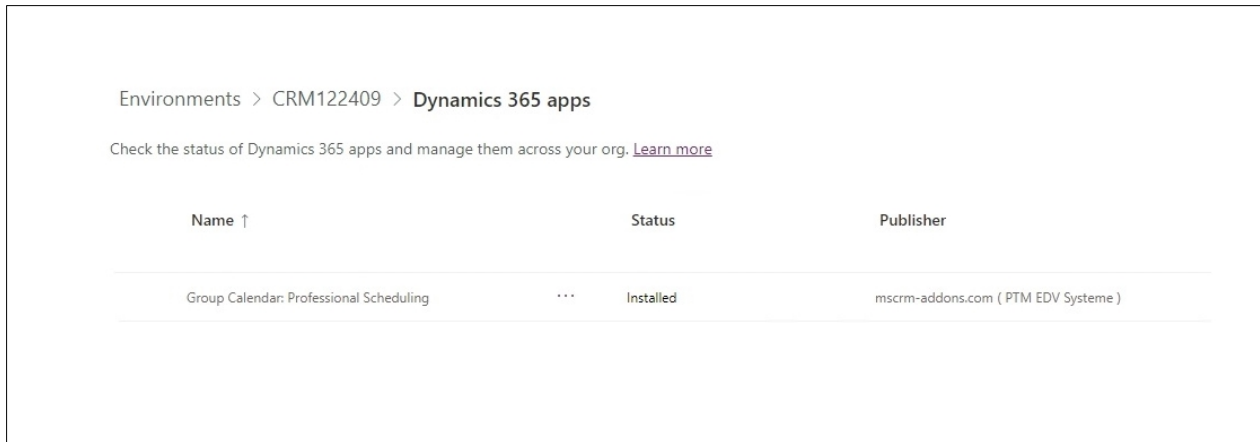
Check the status of Dynamics 365 apps and manage them across your org. [Learn more](#)

Name ↑	Status	Publisher
Agent Productivity Tools	Installed	Microsoft Dynamics 365
App profile manager	Update available	Microsoft Dynamics 365
Connected Field Service Add-on	Installed	Microsoft Dynamics 365
Documents Core Pack: Document automation	Installed	mscrm-addons.com (PTM EDV Systeme)
Dynamics 365 Channel Integration Framework	Installed	Microsoft Dynamics 365
Dynamics 365 ContextualHelp	Installed	Microsoft Dynamics 365
Dynamics 365 Customer Voice	Installed	Microsoft Dynamics 365
Dynamics 365 for Sales, Enterprise Edition App	Installed	Microsoft Dynamics 365
Dynamics 365 FPS Demo Data	Installed	Microsoft Dynamics 365
Dynamics 365 Productivity Tools	Installed	Microsoft Dynamics 365
Dynamics 365 Service Scheduling	Installed	Microsoft Dynamics 365
Environment variables	Installed	Microsoft Dynamics 365
FreeTrialBaseSolution2	Installed	Microsoft Dynamics 365
Group Calendar: Professional Scheduling	Installing...	mscrm-addons.com (PTM EDV Systeme)
Microsoft Dynamics 365 - Social Selling Assistant	Installed	Microsoft Dynamics 365

Figure 25: GroupCalendar - Installing



Because the Dynamics Online Administration panel does not refresh itself automatically, you have to refresh the window from time to time.



The screenshot shows the Dynamics 365 AppSource interface. At the top, it displays the breadcrumb 'Environments > CRM122409 > Dynamics 365 apps'. Below this, there is a message: 'Check the status of Dynamics 365 apps and manage them across your org. [Learn more](#)'. A table lists the installed apps:

Name ↑	Status	Publisher
Group Calendar: Professional Scheduling	Installed	mscrm-addons.com (PTM EDV Systeme)

Figure 26: AppSource – GroupCalendar installed

However, as soon as GroupCalendar is installed, its status will be changed to *Installed*.

1.2.2 Post installation steps (Dynamics 365 Online only)

Once you have installed GC Online successfully, you have to activate it, which means that you have to register your license.

Open Dynamics 365 and click on *Settings > GroupCalendar*. The so opened window provides you with the information required to activate GroupCalendar.

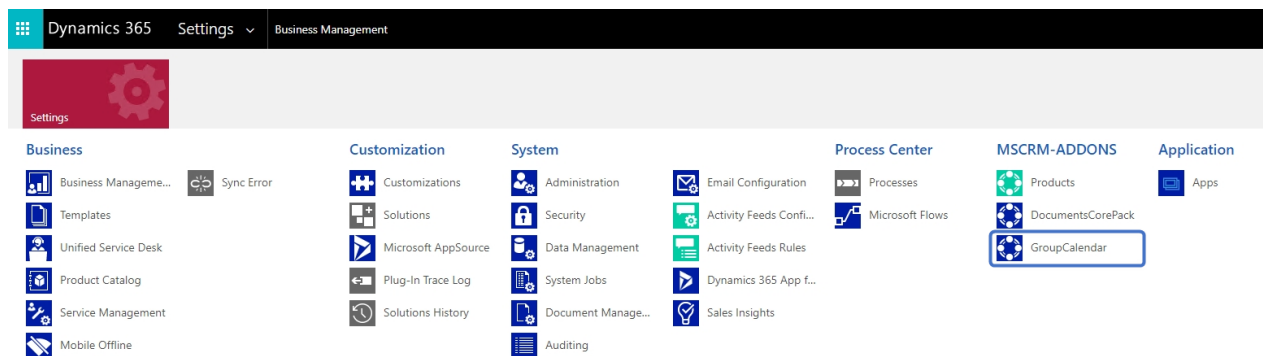



Figure 27: Open GroupCalendar

Please follow the steps displayed in Figure 25 (Open the Dynamics 365 Settings > MSCRM-ADDONS > GroupCalendar). Afterwards, you are provided with the *GroupCalendar Getting Started* surface. Please scroll down to the *GroupCalendar Trial Request*-section and enter your credentials there.

Getting Started with GroupCalendar  **mscrm-addons.com**
Your company for MS-CRM ADD-ONS!

Thank you for your interest in GroupCalendar for Microsoft Dynamics CRM!

- 1 Please enter your email address to the Register light module and click Continue to process your request.
- 2 Enter your Office 365 user to activate the trial version
- 3 Please assign the security roles to your users. Please make sure that the user possesses the following roles in exact the same order: - mscrm-addons general security role
 - mscrm-addons general security role
 - MSCRMAddonsAzureService
 - MSCRM-ADDONS.com GCAutoUpdate

Email address:

[General Terms and Conditions - AGBs](#)
 [Terms Of Use](#)

login to mscrm-addons.com?

Username:

Password:

Figure 28: GroupCalendar trial request

As soon as you have finished, click on the **[Register]**-button and you will be registered on our website. After the login, you can require your 30-days trial version. Please make sure that you have all the necessary roles.

As for the roles: it is of utmost importance that you possess the following roles:

- mscrm-addons general security role
- MSCRMAddonsAzureService
- MSCRM-ADDONS.com GCAutoUpdate

Additionally, you could also change the Dynamics 365 access role in the office 365 portal. (This is optional).

To do so, simply click on *roles* and change the settings.

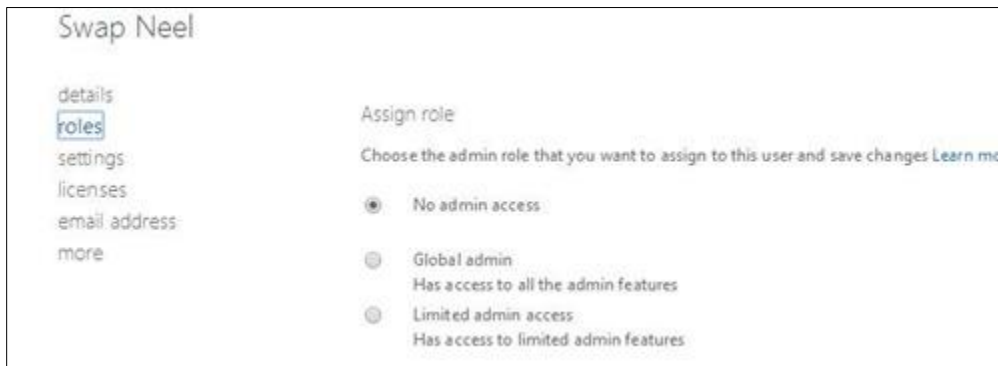


Figure 29: Change the CRM access role in the office 365 portal

If you have decided to change the roles, you must also change the user settings.

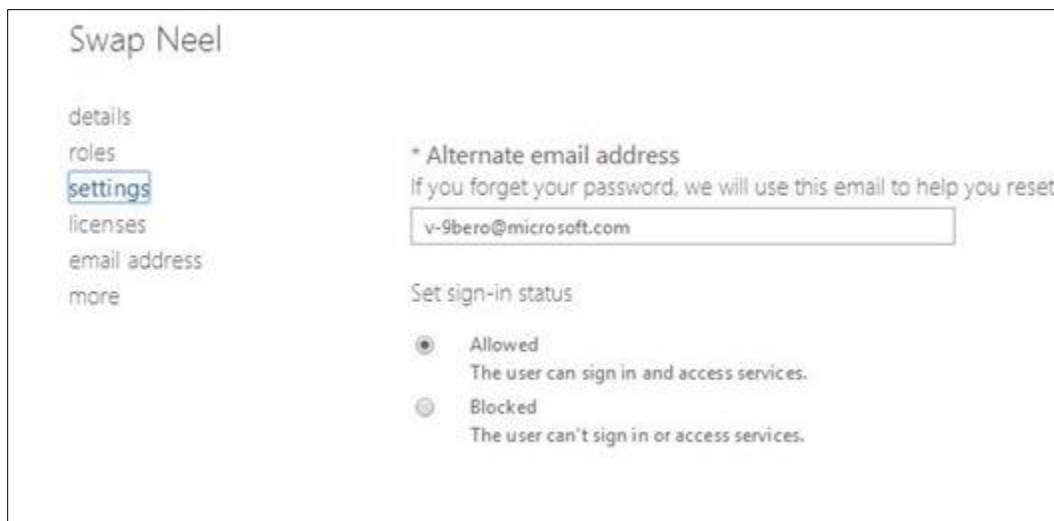


Figure 30: Set sign-in status to 'allowed' in office 365



We cannot stretch the importance of the roles to less. So please - make sure that the user possesses the following roles:

- mscrm-addons general security role
- MSCRMAddonsAzureService
- MSCRM-ADDONS.com GCAutoUpdate

Please open the GroupCalendar Service User (*Settings > Administration > Users*) and set the MSCRMAddons service user to *non-interactive access mode* (to do so, please follow [this blog article](#)).

If the user is still counted by Dynamics 365 licensing after being set to non-interactive, simply remove the Dynamics 365 license from this user in the Office 365 Portal.

Now once again, open GroupCalendar in Dynamics 365 (*Settings > GroupCalendar*) and verify that everything works fine.

Enjoy GroupCalendar for Dynamics experience!

2 How to uninstall GroupCalendar

Because GroupCalendar can be installed in Microsoft Dynamics 365 on premise or online, there are also two different ways to uninstall our add-on:

Uninstall GC (ON PREMISE) ([SEE CHAPTER 2.1 HOW TO UNINSTALL GROUPEALENDAR \(ON PREMISE\), PAGE 26](#))

Uninstall GC (Dynamics 365 ONLINE) ([SEE CHAPTER 2.2 HOW TO UNINSTALL GROUPEALENDAR \(DYNAMICS 365\), PAGE 27](#))

2.1 How to uninstall GROUPEALENDAR (ON PREMISE)

To uninstall GroupCalendar, open *Programs and Features* in the Start Penal.

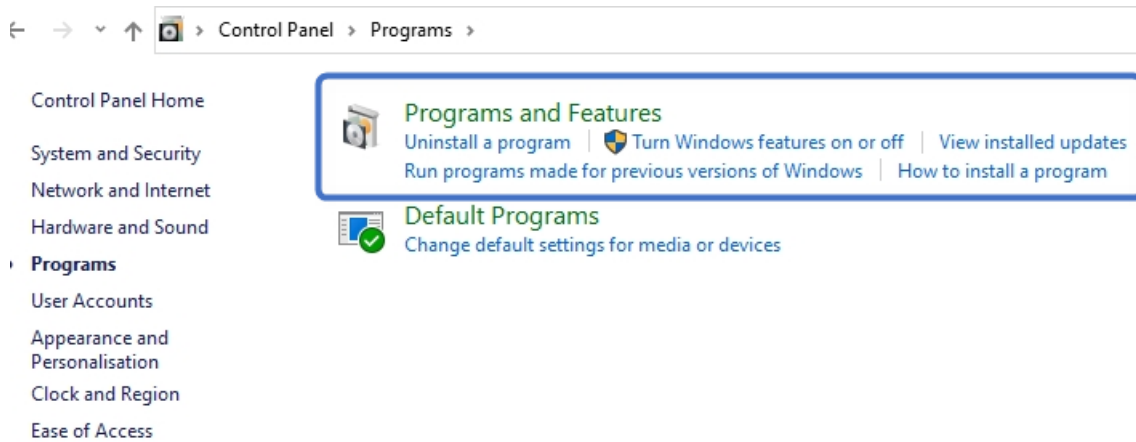


Figure 31: Control panel - Programs

Look for *GroupCalendar for MS Dynamics 365*, select it and click on uninstall. (A double-click on *GroupCalendar for MSCRM* will do as well).

You will be asked if you really want to uninstall GroupCalendar. Confirm with a click on the **[YES]**-button. It may take a few minutes to uninstall GroupCalendar.

2.2 How to uninstall GroupCalendar (Dynamics 365)

If you are using Dynamics 365, the following step-by-step instruction will support you when it comes to uninstall GroupCalendar.



When you uninstall GroupCalendar like this, all related data will be deleted.

First, open the Dynamics 365 solutions and look for the GroupCalendar solutions.

(Dynamics 365 > Settings > Solutions)

<input type="checkbox"/>	Name	Display Name ↑	Version	Package T...	Publisher	Description
<input type="checkbox"/>	GroupCalendarServer...	GroupCalendar by mscrm-addons.com	2020.3	Managed	PTM EDV Systeme GmbH	This solution contains the data for GroupCalend...
<input type="checkbox"/>	GroupCalendarServer...	MSCRM-ADDONS.com GroupCalendar Server Config	2020.1	Managed	PTM EDV Systeme GmbH	This solution contains the configuration for Grou...

Figure 32: Dynamics 365 > Settings > Solutions

That's it!

3 How to access GroupCalendar

No matter if you use Dynamics 365 online or on premise, to access Group Calendar, simply open your CRM and navigate to Dynamics 365 > Settings > GroupCalendar. Click on GroupCalendar to access GroupCalendar.

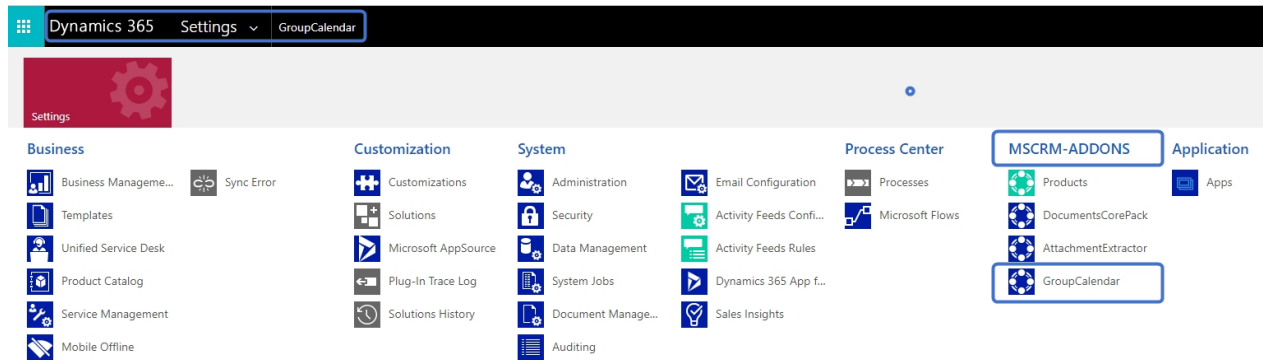


Figure 33: Access GroupCalendar

3.1 How to test GroupCalendar

To test GroupCalendar, simply open your Browser and insert:

http://SERVER:PORT/ORGANIZATION/Webresources/ptm_WebApplicationPreloaderGroupCalenar

Please insert your CRM Server, Port and Organization instead of the items written in capital letters.

4 GroupCalendar settings

The configuration of GroupCalendar is a quite easy one. The starting point of every configuration are the group calendar settings.

4.1 How to open the GroupCalendar settings?

Open the Dynamics 365 *Settings* and click on *MSCRM-ADDONS.com Products*.

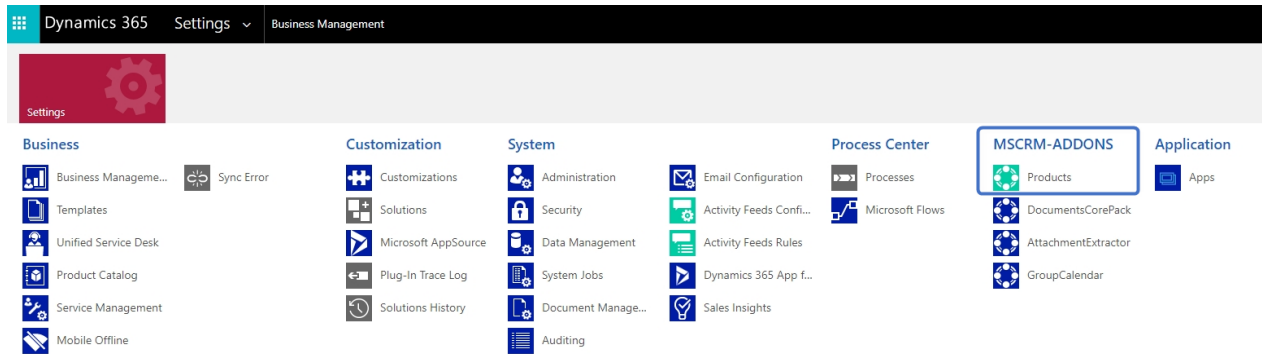


Figure 34: MSCRM-ADDONS - Products

Now you are provided with an overview of all products installed. Please click on *GroupCalendar* in order to open the settings.

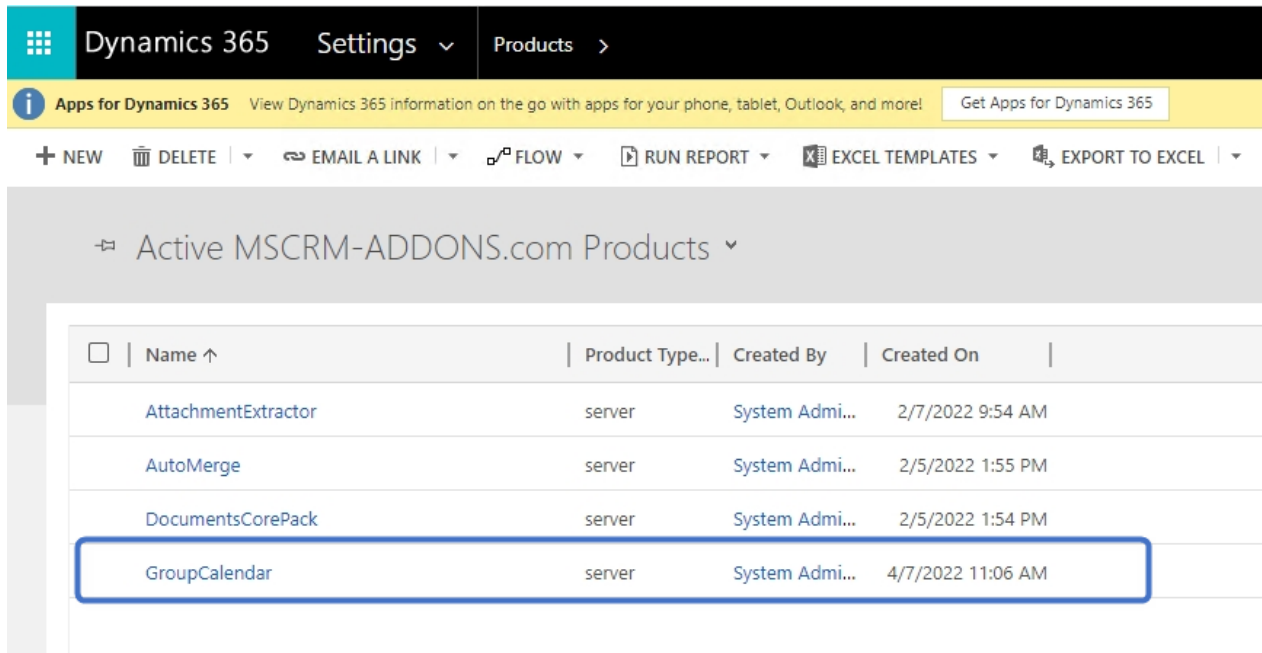


Figure 35: Active MSCRM-ADDONS.com Products

In the so opened window, you find an overview of all the active settingskeys.

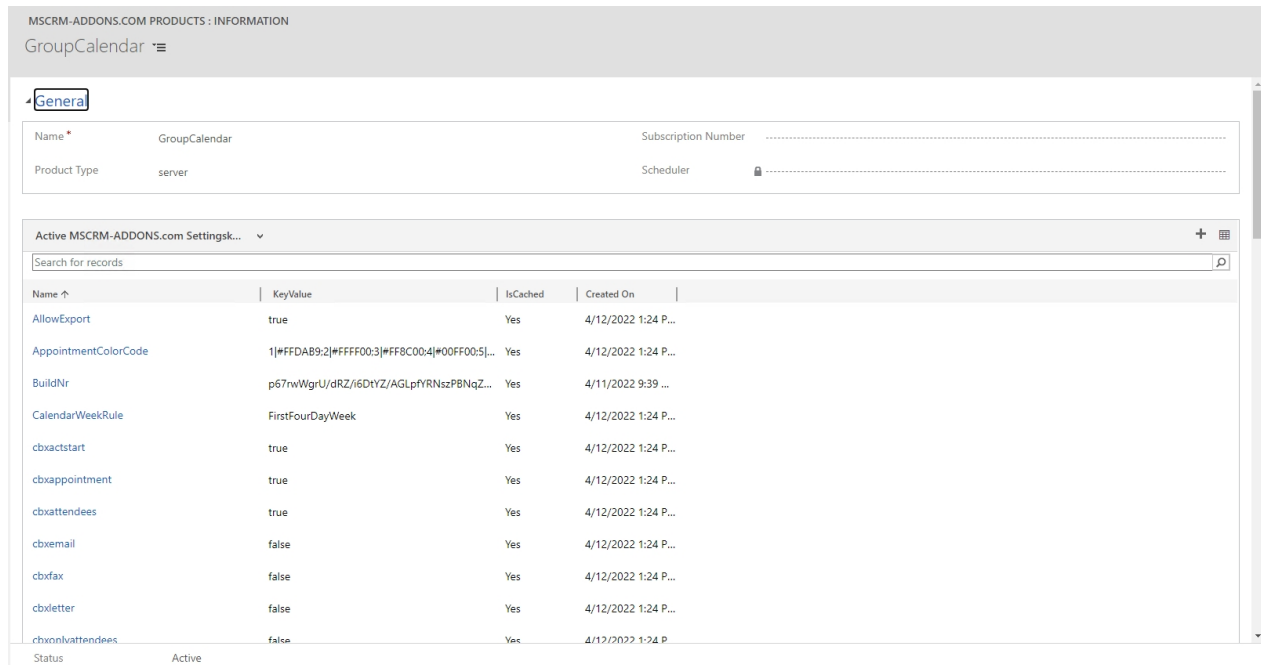


Figure 36: Active MSCRM-ADDONS.com Settingskeys

Supported by the different settingskeys, the customization of GroupCalendar is very easy. Depending on what you would like to customize, you must simply create a certain settingskey. If you have not created a new settingskey yet, please have a look at [this article](#).

Please find an overview of all settingskeys and their meaning in the next chapter.

4.2 GroupCalendar settingskeys overview

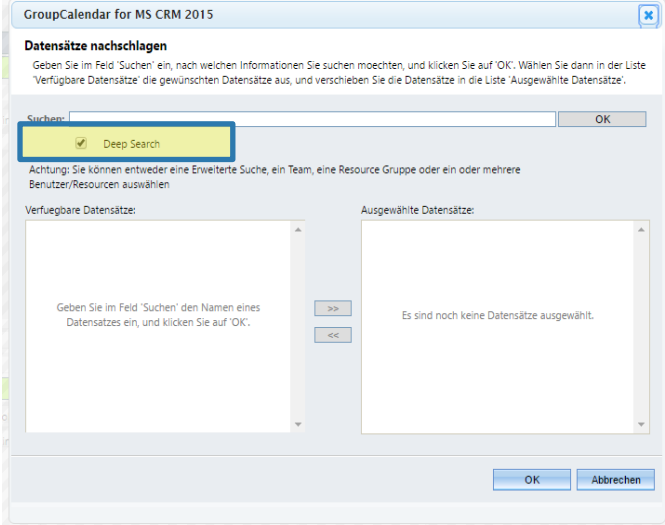
Below, we provide you with an overview of most of the default GroupCalendar settingskeys.



The settingskeys are updated regularly, but it is possible that a certain settingskey that has been added recently, is part of the default settingskeys but not part of this particular list.

KEY	DESCRIPTION
Language	<p>Per default, the CRM User language is used. But when this language does not exist in GC, the language configured here is used.</p> <p>Each label in GroupCalendar can be customized. So it is quite easy to add new languages, as long as you have basic understanding of XML.</p> <p>To add a new language, go to the subdirectory <i>App_Data\localization</i>. There, you will be provided with en.xml, de.xml,...-files. Simply copy the en.xml file save as xy.xml. (xy is a placeholder for the new language). Change the entries in the xy.xml file and after that change the language value in the settings entity to xy.</p> <p>Examples for language codes: en ... English de ... German fr ... French</p>
TimeFormat	HH:mm ... 24Hour-Format (ex. 23:59) hh:mm tt ... 12Hour-Format (ex. 12:59pm)
CalendarWeekRule	<p>Specifies the rule how the week number should be calculated</p> <p>Possible Values: - FirstDay - FirstFourDayWeek - FirstFullWeek</p>

KEY	DESCRIPTION
ignoreStartDateTask ignoreStartDateLetter ignoreStartDateFax ignoreStartDateEmail ignoreStartDatePhonecall	The fields define, if the activity is shown - on the due date only (minus duration) - or shown from start to end date. Possible Values: - true: Activity is shown from due date minus duration till due date - false: activity is shown from start date till due date
cbxtask	Default-value for the checkbox TASK
cbxfax	Default-value for the checkbox FAX
cbxtelephone	Default-value for the checkbox TELEPHONE
cbxemail	Default-value for the checkbox EMAIL
cbxletter	Default-value for the checkbox LETTER
cbxappointment	Default-value for the checkbox APPOINTMENT
cbxonlyattendeess	Default-value for the checkbox ONLYATTENDEES
cbxonlyopen	Default-value for the checkbox ONLYOPEN
Cbxattendeess	Show default value for <i>Show Attendeess</i>
Cbxserviceactivity	Default-value for the checkbox SERVICE ACTIVITY
cbxTDDDataOnly	Default value for the TopDown Only Appointments checkbox
DoNotShowWebCombo	Disable the WebCombo for the users, teams and advanced finds. This makes sense when you have a really large number of users and teams, which can slow down GC drastically. Instead, you can select users/teams via the advanced user select dialog.
hourSections	Configure the default timeslot height of the TopDown View. Possible Values: FifteenMinutes, FiveMinutes, FourHours, FourMinutes, OneMinute, SixMinutes, SixtyMinutes, TenMinutes, ThirtyMinutes, ThreeHours, ThreeMinutes, TwelveMinutes, TwentyMinutes, TwoHours, TwoMinutes
ScrollHourTopDown	Specify to which hour the TopDown view scrolls when you open GC. Possible Values: 1 - 24

KEY	DESCRIPTION
deepSearch	<p>Default value for the following checkbox:</p>  <p><i>Figure 37: GroupCalendar deepsearch</i></p>
AppointmentColorCode	Default value for Color Coding. For further information on Color Coding, please have a look at CHAPTER 6 COLOR-CODING FUNCTIONALITY FOR ALL ACTIVITIES ON PAGE 45 .
EmailColorCode	Default value for Color Coding.
FaxColorCode	Default value for Color Coding.
LetterColorCode	Default value for Color Coding.
PhoneCallColorCode	Default value for Color Coding.
recurringFieldCopyAppointment recurringFieldCopyPhonecall recurringFieldCopyServiceAppointment recurringFieldCopyTask	Define which fields are copied when a copy activity is running
ServiceAppointmentColorCode	Default value for Color Coding.
Unscheduled_UpdateAttribute_appointment	DO NOT CHANGE THIS KEY UNLESS YOU ARE ASKED TO DO SO.
Unscheduled_UpdateAttribute_serviceappointment	DO NOT CHANGE THIS KEY UNLESS YOU ARE ASKED TO DO SO.
UnscheduledFetch_appointment	For further information, please have a look at this blog article .
UnscheduledFetch_serviceappointment	For further information, please have a look at this blog article .
GanttUnscheduledView_appointment	View for unscheduled appointments
GanttUnscheduledView_serviceappointment	View for unscheduled service activities
LicensekeyV... (e.g.: LicenskeyV2011)	The license

5 How to install GroupCalendar in an IFD/Claims-based-Environment

To install GC in an IFD/Claims-based-Environment, you need a few prerequisites.

5.1 Prerequisites

The following downloads must be present if you want to setup the add-on successfully:

1. THE IFD-TOOL (WHICH YOU CAN GET [here](#))
2. AND THE LATEST VERSION OF GROUP CALENDAR (WHICH CAN BE DOWNLOADED [here](#)).

Before you start the installation, MS CRM is required to work correctly in IFD/Claims-Mode, including your ADFS, which should be installed correctly and configured to work with MS CRM.

More details on MS CRM and IFD/Claims can be found [here](#).

The following system configuration is the base for our guide. Your setup will differ in these URLs, so please make sure to replace the URLs with your own URLs when you follow the guide:

Internal URL used to access Microsoft Dynamics CRM:

<https://internalcrm.rc1ifd.ptm-edv.at/>

External URL used to access Microsoft Dynamics CRM:

[https://\[orgname\].rc1ifd.ptm-edv.at/](https://[orgname].rc1ifd.ptm-edv.at/)

ADFS Server:

<https://win2008domain.ptm-edv.at>

The add-on itself also requires a DNS name:

<https://groupcalendarserver.rc1ifd.ptm-edv.at/>

5.2 Basic configuration of GroupCalendar I (CRM part)

The following two step-by-step tutorials are intended to guide you through the installation of GC in an IFD/Claims-based-Environment.

Step 1: Install GroupCalendar on the CRM server.

Step 2: You will be asked to insert your logon information. Fill in the internal IFD name of your CRM.

In our case it is internalcrm.rc1ifd.ptm-edv.at (For further information, please see [CHAPTER 5.1 PREREQUISITES, ON PAGE 34](#)). Then select the organization on which you want to install GC and click on the **[OK]**-button. For further information on the Connection dialog, have a look at our [Connection Dialog documentation](#).

Step 3: Open the IIS (inetmgr.exe) as soon as the installation has been finished. Then, go to Sites > GroupCalendar WebSite. Right click the GroupCalendarserver – WebSite and select *Edit Bindings...*

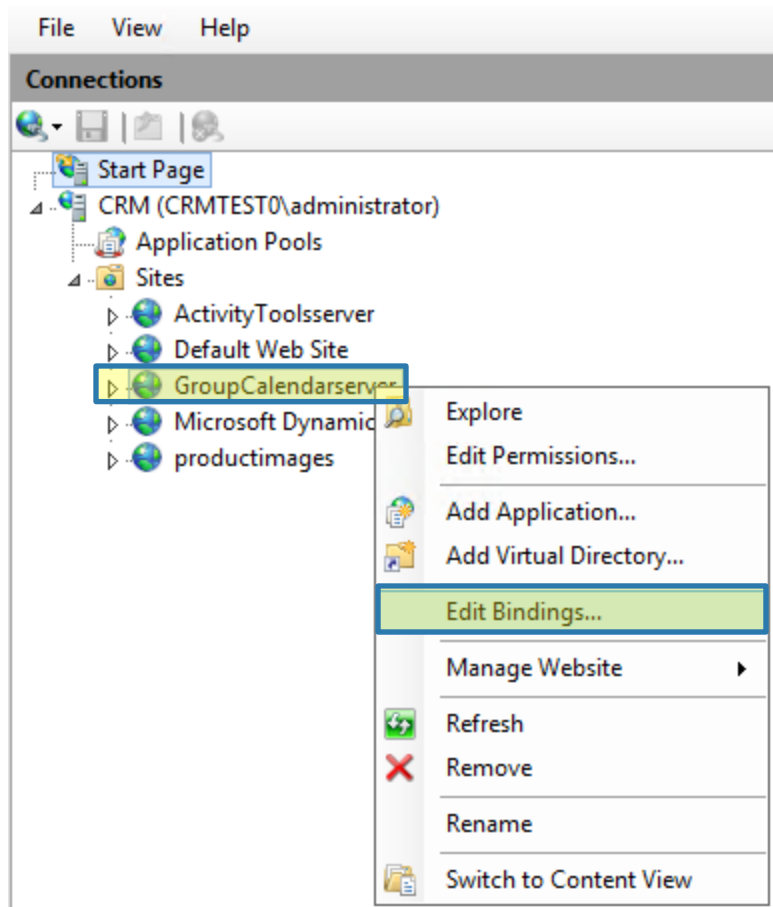


Figure 38: IIS (inetmgr.exe – Edit bindings

Step 4: In the so opened Site Bindings, click on the **[Add]**-button and select the type *https* in the *Add Site Binding*. Do not forget to specify the port (e.g., 4446). Now the website is available for *https*. Click on the **[OK]**-button.

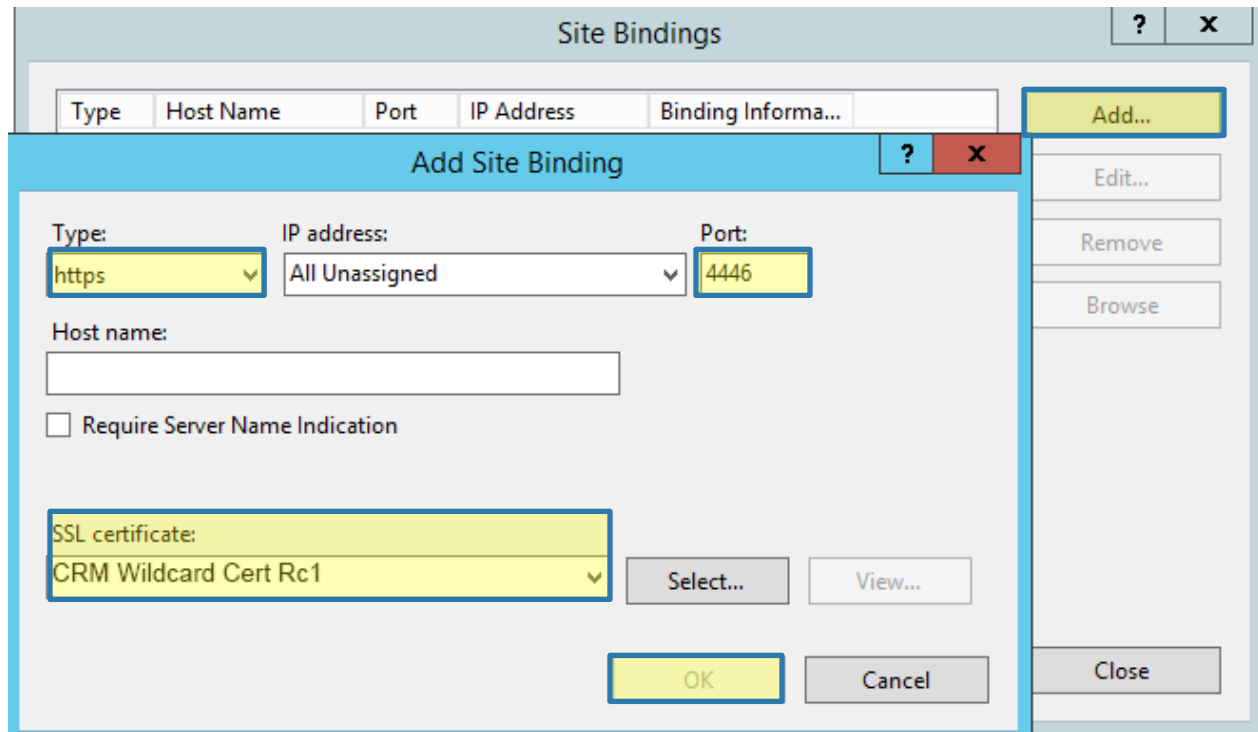


Figure 39: Add Site binding

Step 5: Select the add-on's website once again and double-click on the *Authentication* item on the right side. Make sure that the *Anonymous* and *ASP.Net Impersonation* settings are enabled.

Step 6: The add-on URL must be added to your DNS Server, because your DNS-Server has to resolve the *groupcalendarserver.[yourdomain]* correctly. This means. that it should be resolved with your CRM Server's IP address. If you use an external DNS, make sure that both, the external and the internal DNS, are capable to resolve the URL.

Step 7: Extract the *IFD-Tool* (.zip-file) and execute the *IFDSetup Wizard.exe*. Follow the steps carefully.

Step 8: Open your CRM in your browser and open *Settings > MSCRM-ADDONS.COM products*.

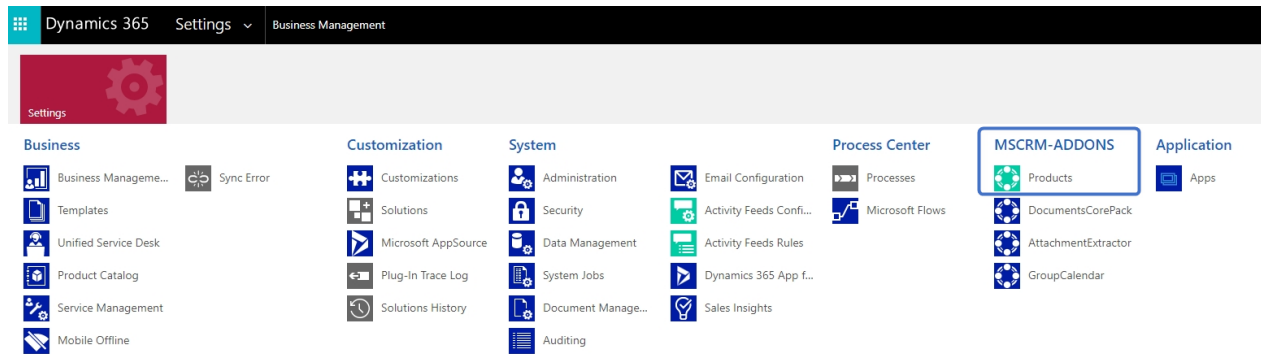


Figure 40: Dynamics 365 > Settings > MSCRM-ADDONS > Products

Step 9: Click on *GroupCalendar* within the *MSCRM-ADDONS.COM Products* window.

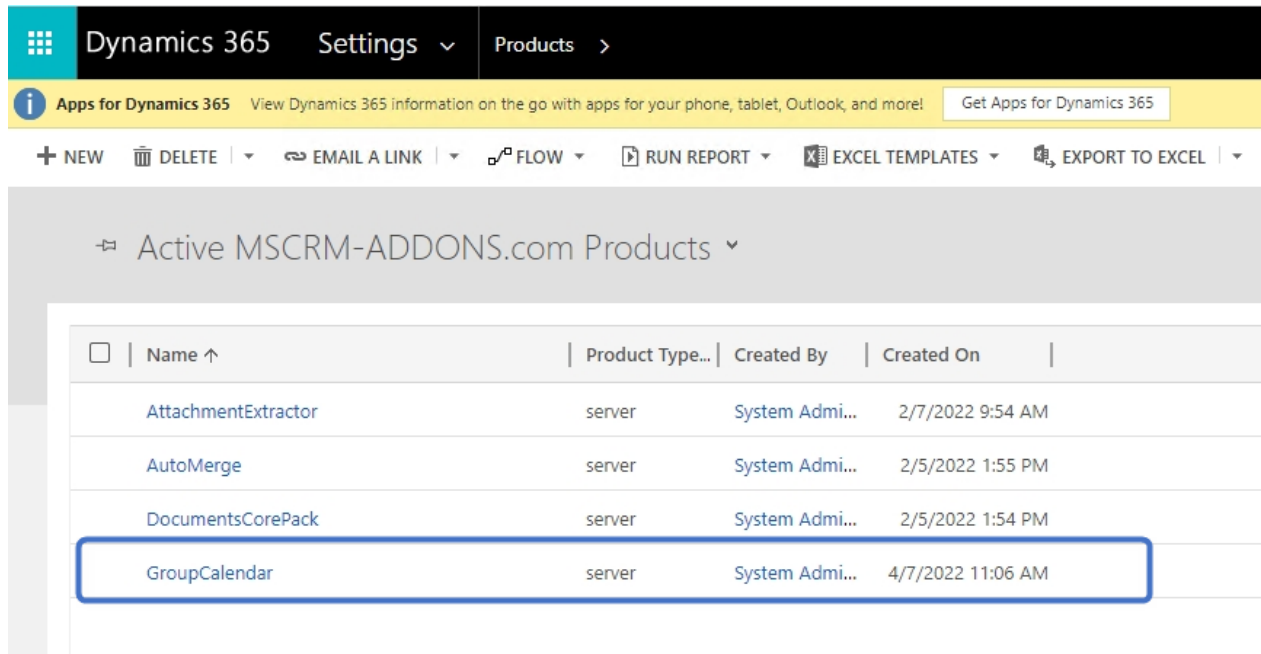


Figure 41: MSCRM-ADDONS.COM products > GroupCalendar

Step 10: In the so opened *GroupCalendarSettingskeys*, look for *WebApplicationPort*

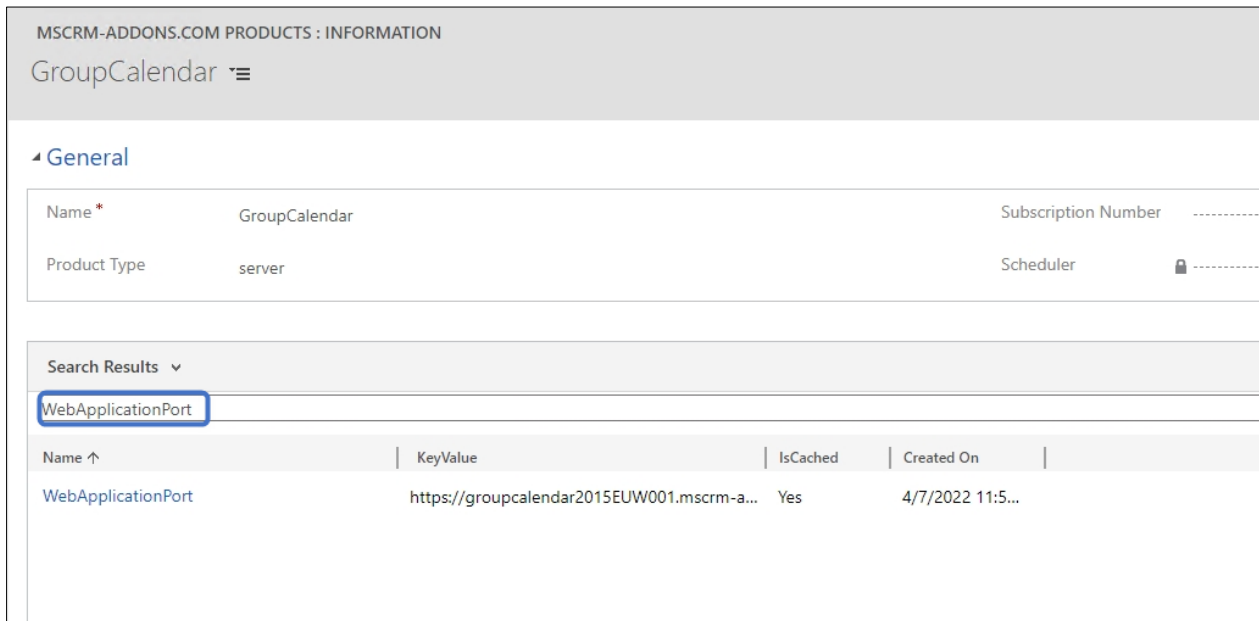


Figure 42: GC SettingsKeys > WebApplicationPort

Step 11: Now open the WebApplicationPort with a click on the Settingskey and replace the existing KeyValue with the following KeyValue:

[httpsPort][httpPort][claimsbased][addonname][debugging]

For example: 4446|5557|true|groupcalendar|false

5.3 Basic configuration of GroupCalendar II (AD FS part)

Once the configuration of the CRM part is finished, you also have to configure the AD FS.

Step 1: Please logon to your *AD FS Server* and start *AD FS 2.0 management*.

Step 2: Please click on the **[Add Relying Party Trust]**-button in the right column of the *Actions*-menu.

Step 3: In the so opened *Add Relying Party Trust-Wizard*, click on the **[Start]**-button and follow the steps carefully.

Step 4: On the *Select Data Source*-page, click on the **[Import data about the relying party published online or on a local network]**-button and then type in the URL to locate the *federationmetadata.xml* file.



The federation metadata is created with the IFD-Tool on the CRM Server.
For example,

<https://groupcalendar.rc1ifd.ptm-edv.at:4446/FederationMetadata/2007-06/FederationMetadata.xml>

Type this URL in your browser and make sure that no certificate-related warnings appear.

Step 5: Click on the **[Next]**-button. On the *Specify Display Name*-page, type in a display name, such as for example *GroupCalendar IFD*, and click again on the **[Next]**-button.

Step 6: On the so opened *Choose Issuance Authorization Rules*-page, leave the *Permit all users to access this relying party*-option selected and then again, click on the **[Next]**-button. The *Ready to Add Trust*-page opens. Click on the **[Next]**-button and then click on the **[Close]**-button.

Step 7: If the *Rules Editor* appears, click on the **[Add Rule]**-button. If not, right-click the *relying party object* in the *Relying Party Trustlist*, that you have previously created. Then click on the **[Edit Claims Rules]**-button and then click on the **[Add Rule]**-button.



Make sure that the *Issuance Transform Rules*-tab is selected.

Step 8: In the *Claim rule template*-list, select the *Pass Through or Filter an Incoming Claim*-template, and then click on the **[Next]**-button.

Step 9: Create the following rule:

- Claim rule name: *Pass Through UPN* (or something similarly descriptive)

Add the following mapping:

- Incoming claim type: UPN
- Pass through all claim values

Next, click on the **[Finish]**-button.

Step 10: In the *Rules Editor*, click on the **[Add Rule]**-button and in the *Claim rule template*-list, select the *Pass Through or Filter an Incoming Claim*-template. Click on the **[Next]**-button.

Create the following rule:

- Claim rule name: *Pass Through Primary SID* (or something similarly descriptive)

Add the following mapping:

- Incoming claim type: UPN
- Pass through all claim values

Finally, click on the **[Finish]**-button.

Step 11: In the Rules Editor, click on the **[Add Rule]**-button. Then, in the *Claim rule template*-list, select *Transform an Incoming Claimtemplate* and then click on the **[Next]**-button.

Step 12: Create the following *rule*:

- Claim rule name: Transform Windows Account Name to Name (or something descriptive)

Add the following mapping:

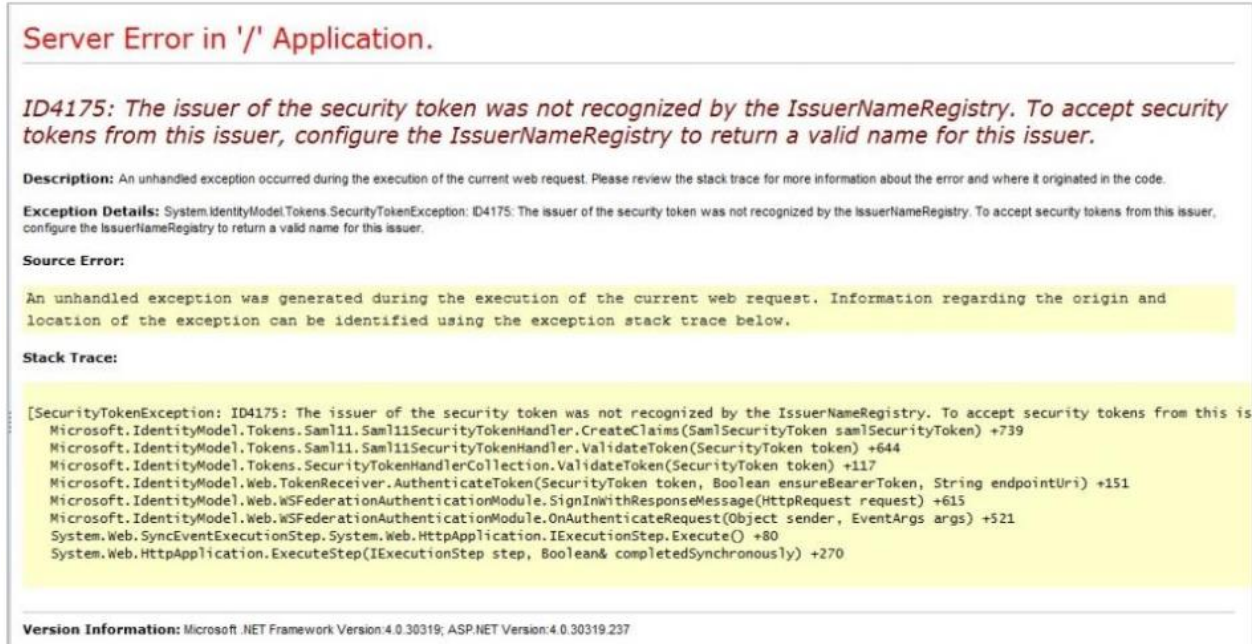
- Incoming claim type: Windows account name
- Outgoing claim type: Name
- Pass through all claim values

Step 13: Click on the **[Finish]**-button and when you have created all three rules, click on the **[OK]**-button. Congratulations! You can now use GroupCalendar in your IFD/Claims Environment!

5.4 Troubleshooting in an IFD/Claims-based-Environment

5.4.1 Common error message

There is a common error message, that appears quite often.



Server Error in '/' Application.

ID4175: The issuer of the security token was not recognized by the IssuerNameRegistry. To accept security tokens from this issuer, configure the IssuerNameRegistry to return a valid name for this issuer.

Description: An unhandled exception occurred during the execution of the current web request. Please review the stack trace for more information about the error and where it originated in the code.

Exception Details: System.IdentityModel.Tokens.SecurityTokenException: ID4175: The issuer of the security token was not recognized by the IssuerNameRegistry. To accept security tokens from this issuer, configure the IssuerNameRegistry to return a valid name for this issuer.

Source Error:

An unhandled exception was generated during the execution of the current web request. Information regarding the origin and location of the exception can be identified using the exception stack trace below.

Stack Trace:

```
[SecurityTokenException: ID4175: The issuer of the security token was not recognized by the IssuerNameRegistry. To accept security tokens from this issuer, configure the IssuerNameRegistry to return a valid name for this issuer.]
Microsoft.IdentityModel.Tokens.Saml11.Saml11SecurityTokenHandler.CreateClaims(SamlSecurityToken samlSecurityToken) +739
Microsoft.IdentityModel.Tokens.Saml11.Saml11SecurityTokenHandler.ValidateToken(SecurityToken token) +644
Microsoft.IdentityModel.Tokens.SecurityTokenHandlerCollection.ValidateToken(SecurityToken token) +117
Microsoft.IdentityModel.Web.TokenReceiver.AuthenticateToken(SecurityToken token, Boolean ensureBearerToken, String endpointUri) +151
Microsoft.IdentityModel.Web.WSFederationAuthenticationModule.SignInWithResponseMessage(HttpRequest request) +615
Microsoft.IdentityModel.Web.WSFederationAuthenticationModule.OnAuthenticateRequest(Object sender, EventArgs args) +521
System.Web.SyncEventExecutionStep.System.Web.HttpApplication.IExecutionStep.Execute() +80
System.Web.HttpApplication.ExecuteStep(IExecutionStep step, Boolean& completedSynchronously) +270
```

Version Information: Microsoft .NET Framework Version:4.0.30319; ASP.NET Version:4.0.30319.237

Figure 43: GC Failure message

Here are the two main reasons why this error message appears and some solutions.

Reason 1:

The error indicates that you are using a wrong certificate for the ADFS signing.

Solution: Make sure that the *web.config* matches the one the token signing certificate in ADFS.

```
<issuerNameRegistry typetype="Microsoft.IdentityModel.Tokens.ConfigurationBasedIssuerNameRegistry,
Microsoft.IdentityModel, Version=3.5.0.0, Culture=neutral,
PublicKeyToken=31bf3856ad364e35"> <trustedIssuers> <add
thumbprint="37a59abae1a394ffd8f0fd750c2e38e98069e349"
```

```
Name= http://win2008domain.ptm-edv.at/adfs/services/trust />
```

```
<trustedIssuers> </issuerNameRegistry>
```

Reason 2:

This error could also indicate problems with the access rights of the certificates' private key (which is mainly an issue of self-signed certificates).

Solution: Open your certificate store on the server (MMC, add certificate snapin for local computer) and look for your HTTPS certificate. In the so opened *Context*-menu, select the *manage private keys*-option and grant access to everyone.

5.4.2 Checklist for general troubleshooting in an IFD/Claims-based Environment

If you get another error message, try our general troubleshooting checklist. If your question

- Is the Setting WebApplicationPort still intact?
- Are there any not http/https bindings in CRM?
- Are there any not http/https bindings in the products website?
- Is the DNS correctly resolving the products link?
- Has the Connection profile been created with IFD as connection type?

You can check each single step in [CHAPTER 5 HOW TO INSTALL GROUPCALENDAR IN AN IFD/CLAIMS-BASED-ENVIRONMENT ON PAGE 34 ET SEQU.](#)

What to do if the error you receive is not part of our troubleshooting section?

No worries – simply contact our support! Please send an email to support@mscrm-addons.com and attach a screenshot of the failure message including a short description of how/when the error occurred.

6 Color-coding functionality for all activities

GroupCalendar provides you with the possibility to define a specific color for each activity. As soon as you have activated this functionality in the settings, GroupCalendar offers you the possibility to select a color for an activity. For further information on the GroupCalendar Settings, please have a look at [CHAPTER 4 GROUPCALENDAR SETTINGS ON PAGE 28](#).

To activate the color-coding-functionality, you have to add the attribute *ptm_colorcode2011* to the main form of the *activity* entity. The attribute's display name is *Color*. It consists of 12 predefined colors. For further information, please have a look at [CHAPTER 10.1 HOW TO ACTIVATE THE COLOR-CODING FUNCTIONALITY FOR ACTIVITIES ON PAGE 56](#). But: you can add additional colors. For further information on how to add additional colors, please have a look at [CHAPTER 10.2 HOW TO ADD NON-STANDARD COLORS TO GROUPCALENDAR ON PAGE 61](#).

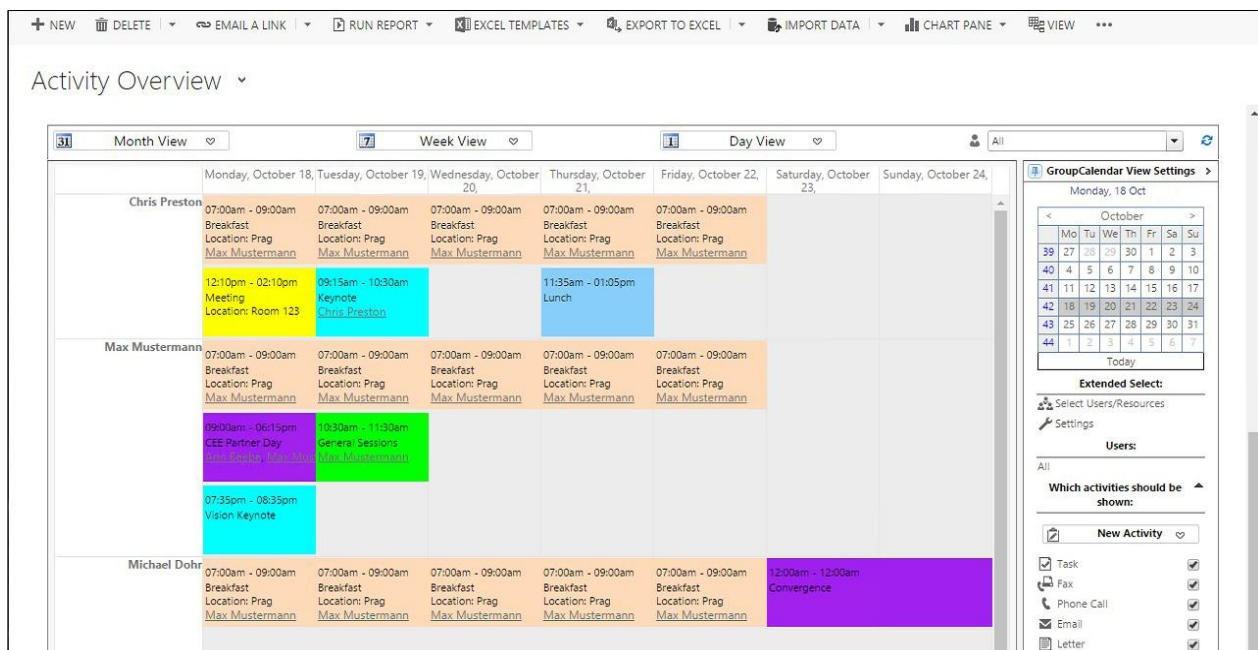


Figure 44: Color Coding example – weekly Timeline view

7 Show additional attributes in GroupCalendar

There are two methods to customize activity attribute in GroupCalendar. The more flexible way is explained in this documentation, while [this blog article](#) explains the alternative.

This is how a standard tooltip in GroupCalendar looks like:

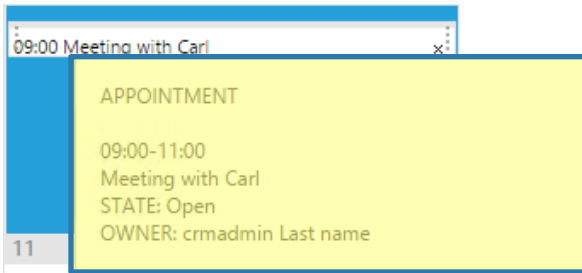


Figure 45: Standard tooltip in GroupCalendar

This standard can be customized. Basically, you have the possibility to configure as many lines as you wish, there is no limitation. The flexibility is possible, because an XML is used to create your additional attributes. There is only one setting necessary for all additional attributes.

The feature can be applied to GANTT-, TopDown-, Timeline- and Agenda View in the Day-, and Weekview. It can also be applied to the GANTT-, Agenda- and Timeline view in the Monthview.

Please follow the instructions in this chapter in order to learn how to show additional attributes in GroupCalendar.

Please find some examples for additional attributes in GroupCalendar (Day view) below.

Example for Top-Down view:

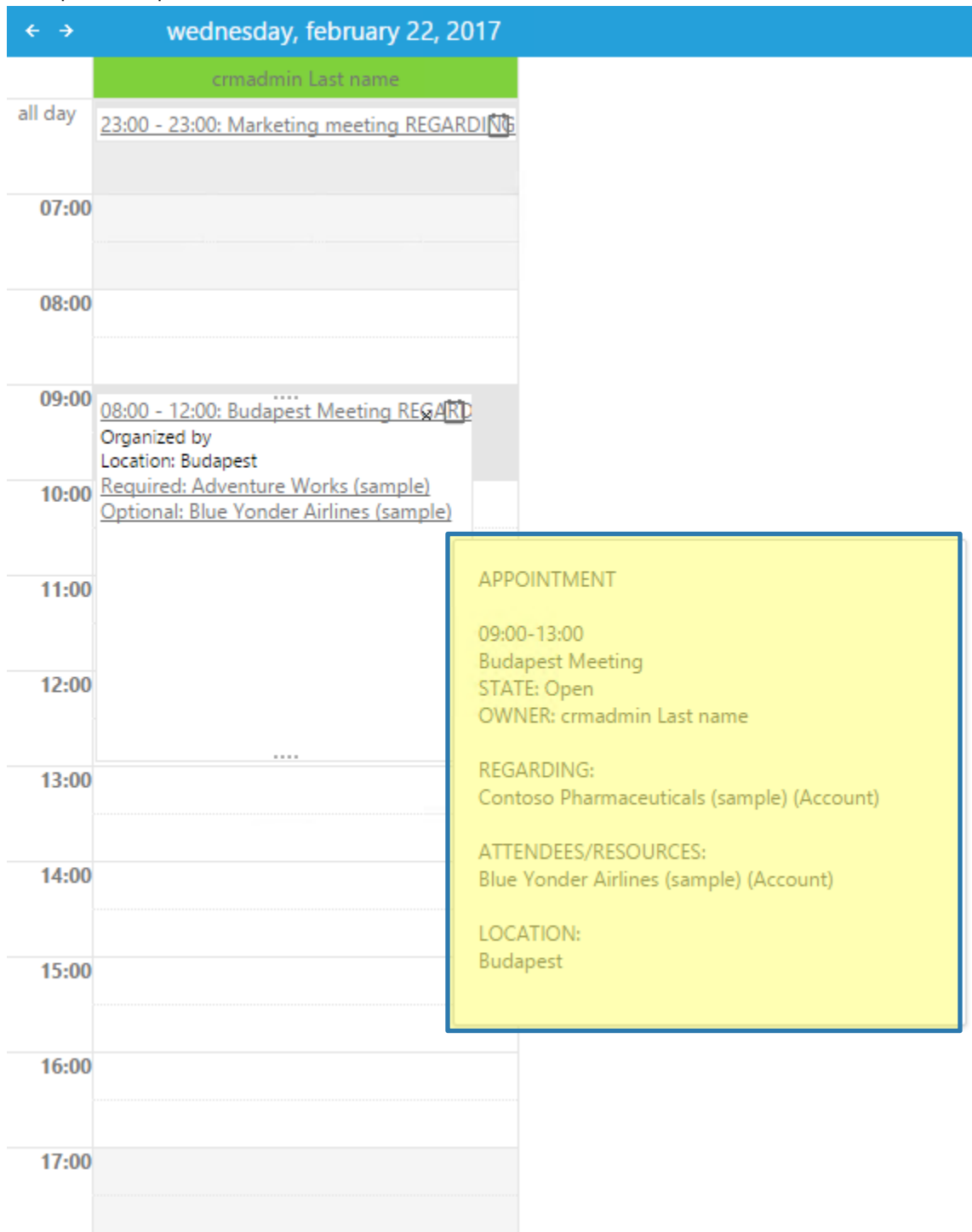


Figure 46 Day View - Top Down

Example for GANTT view:

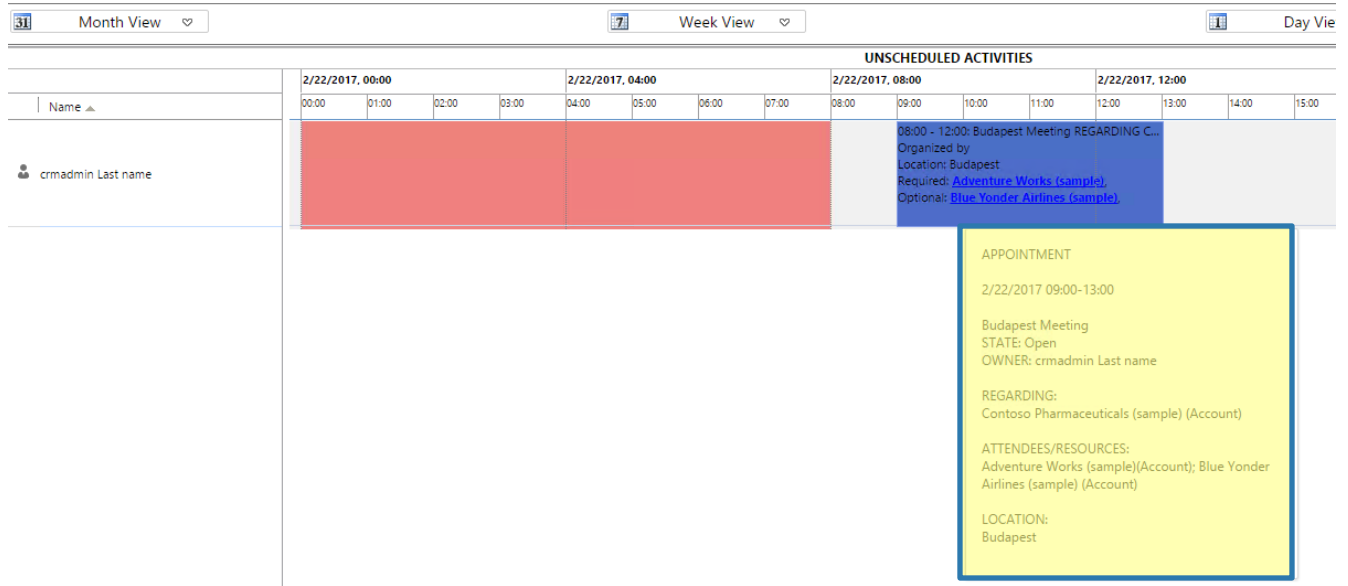


Figure 47 Day view - GANTT

Example for Agenda view:

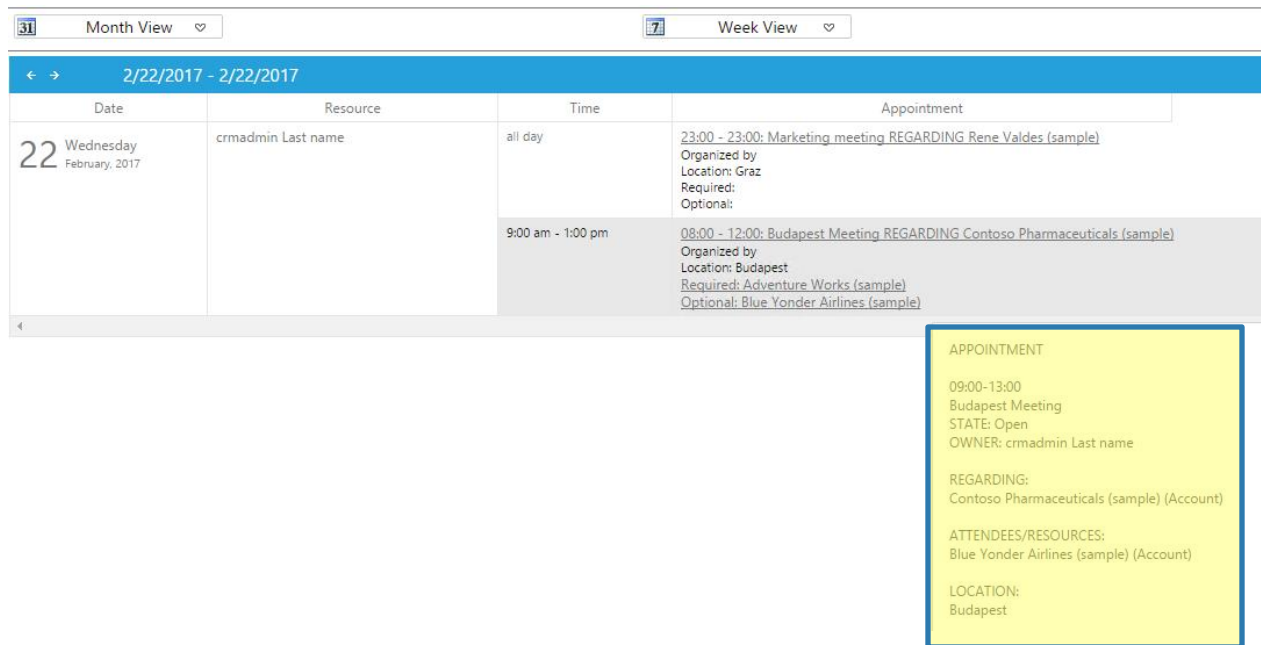


Figure 48 Day View - Agenda

Example for Timeline view:

The screenshot displays the GroupCalendar interface in a 'Day view - Timeline' format. At the top, there is a navigation bar with options: 'NEW ACTIVITY', 'NEW RECORD', 'IMPORT DATA', 'SMARTBAR DIALOG', and 'POWERSEARCH'. Below this, the view is set to 'Month View' (with a 'Week View' option also visible). The date shown is 'Wednesday, February 22, 2017'. The main area shows a vertical timeline with two appointments:

- 23:00 - 23:00: Marketing meeting REGARDING Rene Valdes (sample)**
Organized by: [Name]
Location: Graz
Required: [Name]
Optional: [Name]
- 08:00 - 12:00: Budapest Meeting REGARDING Contoso Pharmaceuticals (sample)**
Organized by: [Name]
Location: Budapest
Required: Adventure Works (sample)
Optional: Blue Yonder Airlines (sample)

A yellow popup window is overlaid on the 'Budapest Meeting' appointment, providing the following details:

APPOINTMENT
2/22/2017 09:00-13:00
Budapest Meeting
STATE: Open
OWNER: crmadmin Last name

REGARDING:
Contoso Pharmaceuticals (sample) (Account)

ATTENDEES/RESOURCES:
Adventure Works (sample)(Account); Blue Yonder Airlines (sample) (Account)

LOCATION:
Budapest

Figure 49 Day view - Timeline

7.1 Create a new AdditionalAttributes settingskey

First of all, you will have to create a new settingskey. If you haven't created a settingskey yet, please read this [blog article](#). Please enter the following values:

Name*: AdditionalAttributes

IsCached*: Yes

KeyValue: Please enter here the XML (please find an example plus an explanation below)

MSCRM-ADDONS.COM SETTINGSKEYS : INFORMATION

New MSCRM-ADDO... ☰

General

Name *

AdditionalAttributes

IsCached *

Yes

KeyValue

```
<AdditionalAttributes>
<Entity name="appointment">
<View name="all" >
<Activity override="false">
<Line> [requiredattendees] other text</Line>
</Activity>
<Tooltip override="true">
<Line> Tooltip is [scheduledstart::yyyy HHmm] different in just one line [requiredattendees]</Line>
</Tooltip>
</View>
<View name="daytopDOWN" >
<Activity override="false">
<Line> this is completely different</Line>
<Line/>
<Line> [requiredattendees] other text</Line>
</Activity>
<Tooltip override="true">
<Line> Tooltip is [scheduledstart] different in just one line [requiredattendees]</Line>
```

Basically, that's it! Once the key is saved, your additional attributes are customized the way you have set it in the XML. Please find some brief explanation to the XML in the next chapter.

7.2 The XML explained

The XML can be customized according to your needs.

7.2.1 XML example

This quite simple example shows how to show the location for appointment:

Red is the original basic condition.

Blue are the specific settings for 'location appointment'.

```
<AdditionalAttributes>  
<Entity name="appointment">  
<View name="all" >  
<Activity override="false">  
<Line>Location: [location]</Line>  
</Activity>  
</View>  
</Entity>  
</AdditionalAttributes>
```

For all who have not worked with XML yet, we provide a more detailed explanation of the XML in the next chapter.

7.3 XML explained step by step

Red is the condition of the XML.

Black is the explanation.

`<AdditionalAttributes>`

This is the main node. It defines the basic functionality of the XML

`<Entity name="appointment">`

This is the entity node. It defines, for which entity the Additional attribute should be created.

Under the main node, you may enter as many entity-nodes as you wish. Possible 'names' for entity nodes are for example: serviceappointment, task, fax, letter, phonecall, email (here: appointment) etc.

`<View name="all" >`

Here, please enter the view node(s). If you enter 'all', it regards all views. If you wish to customize a certain view, please use one of the following terms:

monthgantt, weekgantt, daygantt, monthtimeline, weektimeline, daytimeline, monthagend, weekagenda, dayagenda, weektopdown, daytopdown

`<Activity override="false">`

Please define here which information should be visible in the view.

override false means that it will be added to the current information (subject)

override true means that you will have to define the whole activity text here

`<Line>[requiredattendees] other text</Line>`

In the line section, every line can be configured as you wish. The attribute that should be configured is shown inside [square brackets]. Everything else is free text. The only exception are date fields. When using date fields, you are able to define the format using [DATEATTRIBUTE::FORMAT]. Please find a list of all possible date formats here:

[https://msdn.microsoft.com/en-us/library/8kb3ddd4\(v=vs.110\).aspx](https://msdn.microsoft.com/en-us/library/8kb3ddd4(v=vs.110).aspx).

`<Line>My custom text [location] lorem ipsum [scheduledstart]</Line>`

When using a line node, you may as well insert blank lines.

</Activity>

Please define here which information should be visible in TOOLTIP if 'appointment' has been selected as entity name.

- override false means that it will be added to an already generated TOOLTIP.
- override true means that the whole TOOLTIP text will be defined here.

A possible configuration for such a tooltip text can be found below.

The configuration of a tooltip works similar to the configuration of a line.

<Tooltip override="true">

<Line>Tooltip is [scheduledstart::yyyy HHmm] different in just one line [requiredattendees]</Line>

</Tooltip>

</View>

<View name="daytopDOWN" >

<Activity override="false">

<Line>this is completely different</Line>

<Line/>

<Line>[requiredattendees] other text </Line>

</Activity>

<Tooltip override="true">

<Line>Tooltip is [scheduledstart] different in just one line [requiredattendees]</Line>

</Tooltip>

</View>

</Entity>

<Entity name="serviceappointment">

<View name="all" >

<Activity override="true">

<Line>sa My custom text [location] lorem ipsum dolores [scheduledstart]</Line>

<Line>sa [subject] other text</Line>

</Activity>

<Tooltip>

<Line>sa Tooltip is [scheduledstart::HHmm] different in just one line</Line>

<Line>sa Tooltip 2 is [scheduledstart::hh:mmtt] different in just one line</Line>

Please finish the XML by closing each configured node:

</Tooltip>

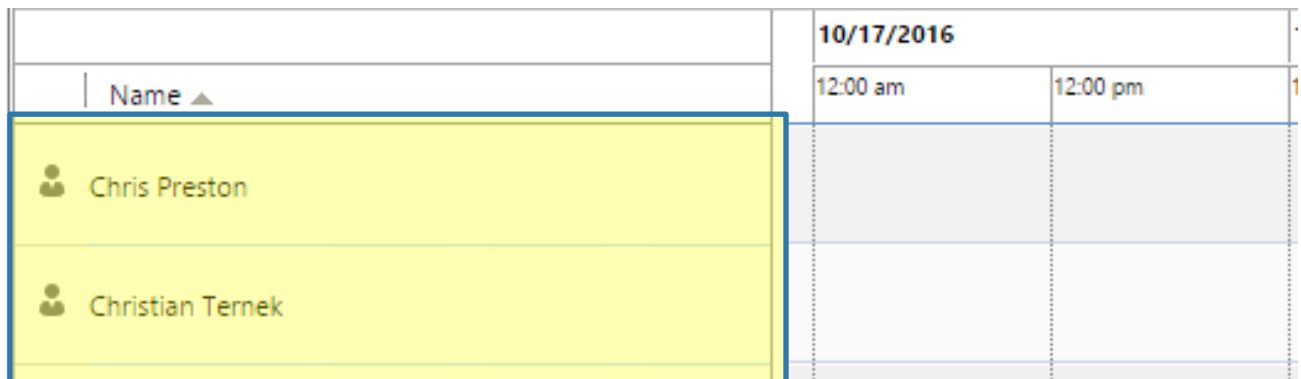
</View>

</Entity>

</AdditionalAttributes>

8 GANTT VIEW: Custom columns in the user list

Group Calendar offers you the possibility to customize the user pane. Per default, only the full name of the system user is shown.



	10/17/2016		
Name ▲	12:00 am	12:00 pm	1
Chris Preston			
Christian Ternek			

Figure 50: Standard settings

The custom columns functionality allows you to customize the columns. You can define the columns, its width and sorting.

Furthermore, you can add additional information fields to the user, like for example the access mode, the full name and the primary e-mail.

Learn how to customize the columns in [CHAPTER 10.3 HOW TO CUSTOM COLUMNS IN THE USER LIST ON PAGE 70](#).

9 Show Working Hours and Time-Off in GANTT – AND TOPDOWN VIEW

Up from Dynamics CRM 2015, it is possible to specify working hours and time-offs (e.g. vacation) for each user and resource. With Group Calendar, you can additionally display these hours.

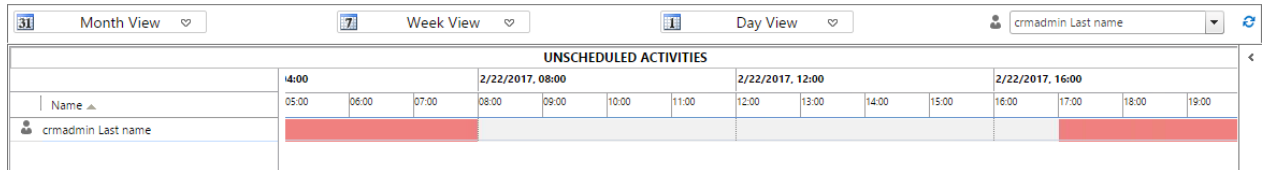


Figure 51: GANTT view showing time off (red) and working hours (grey)

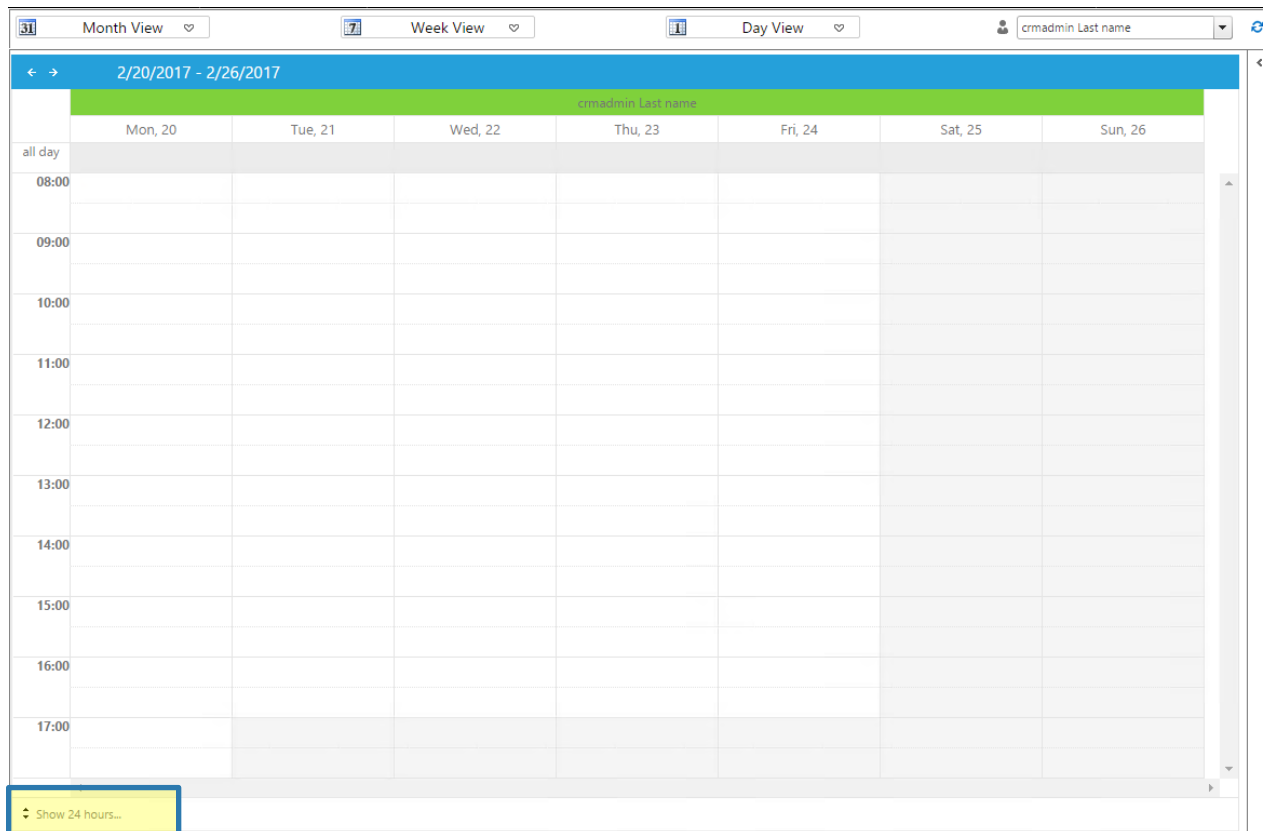


Figure 52: Top down view showing working hours (white) and time off (grey)



You have the possibility to switch from the working hours view to a 24-hour view by clicking on the highlighted option in the above figure.

For further information, please have a look at our How-To section in [CHAPTER 10.4 HOW TO SHOW WORKING HOURS AND TIME-OFF ON PAGE 76](#).

10 Tutorials (“How To’s”)

This chapter provides you with helpful tutorials that show you how to work with GroupCalendar efficiently.

10.1 How to activate the color-coding functionality for activities

The following step-by-step instruction outlines how to activate the color-coding functionality for activities in GroupCalendar.



The following step-by-step instruction describes how to activate the color-coding-functionality for the appointment entity. But: You can apply Step 1 – 6 (with the exception of selecting another *activity type* than appointment) to any other activity.

- 1) Open your CRM and navigate to Settings > Customization > Customize the system.

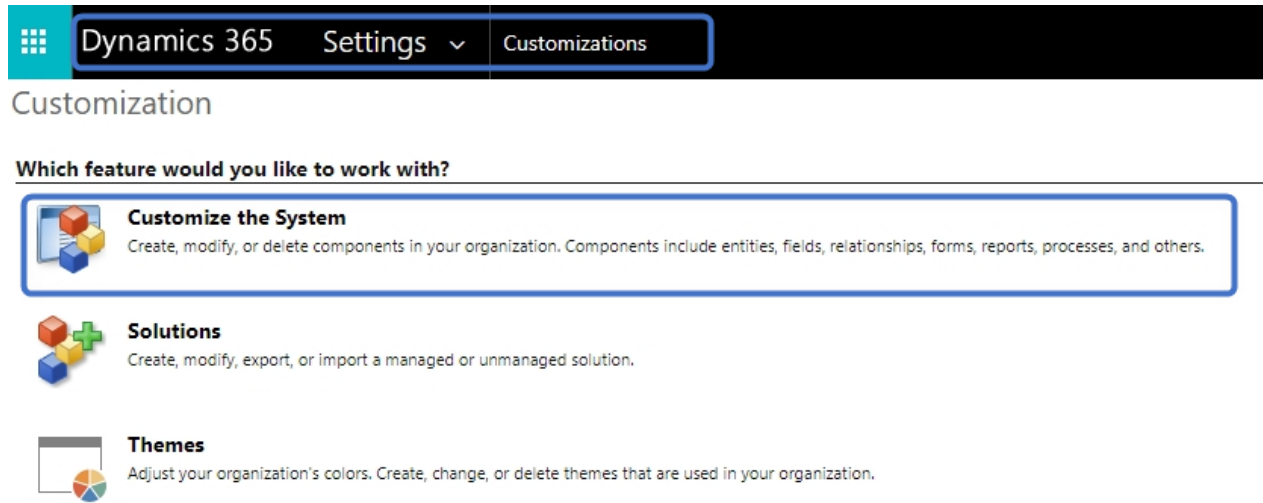


Figure 53: Customize the system

- 2) In the so opened window, click on Entities and double click on the entity Appointment. (If you want to apply this step to another entity, simply select the entity you want to customize).

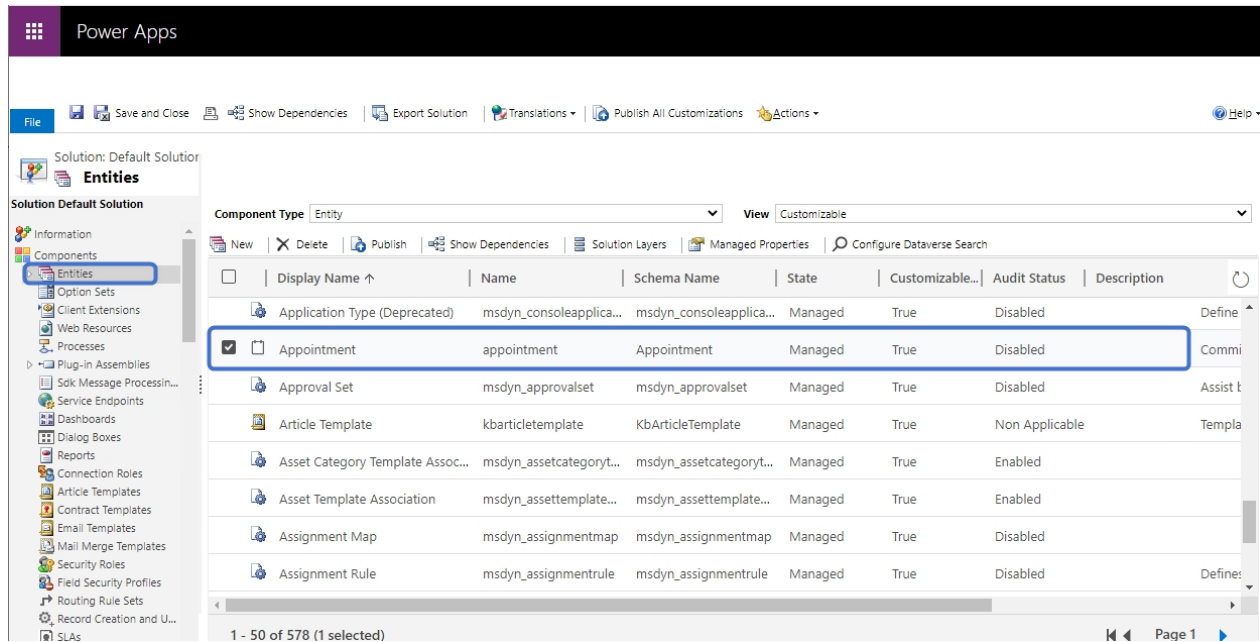


Figure 54: Default Solution > Entities > Appointment

- 3) In the so opened *Appointment entity settings*, click on *Forms* in the menu on the left and you will receive a list with all the forms of the entity. Double click on the main *Appointment* form.

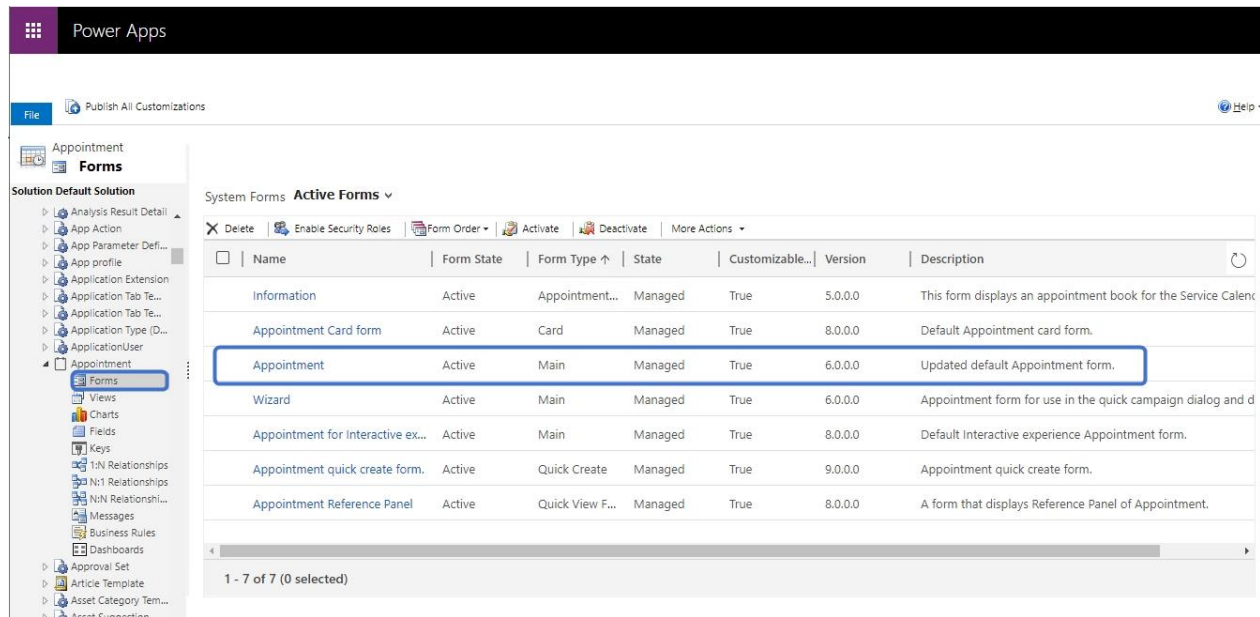


Figure 55: Appointment entity settings

- 4) In the so opened window, you can customize the main form of this entity. To add the color-coding-functionality, simply click on the *Color*-field within the menu on the right and position it in a free space within the form via drag and drop.

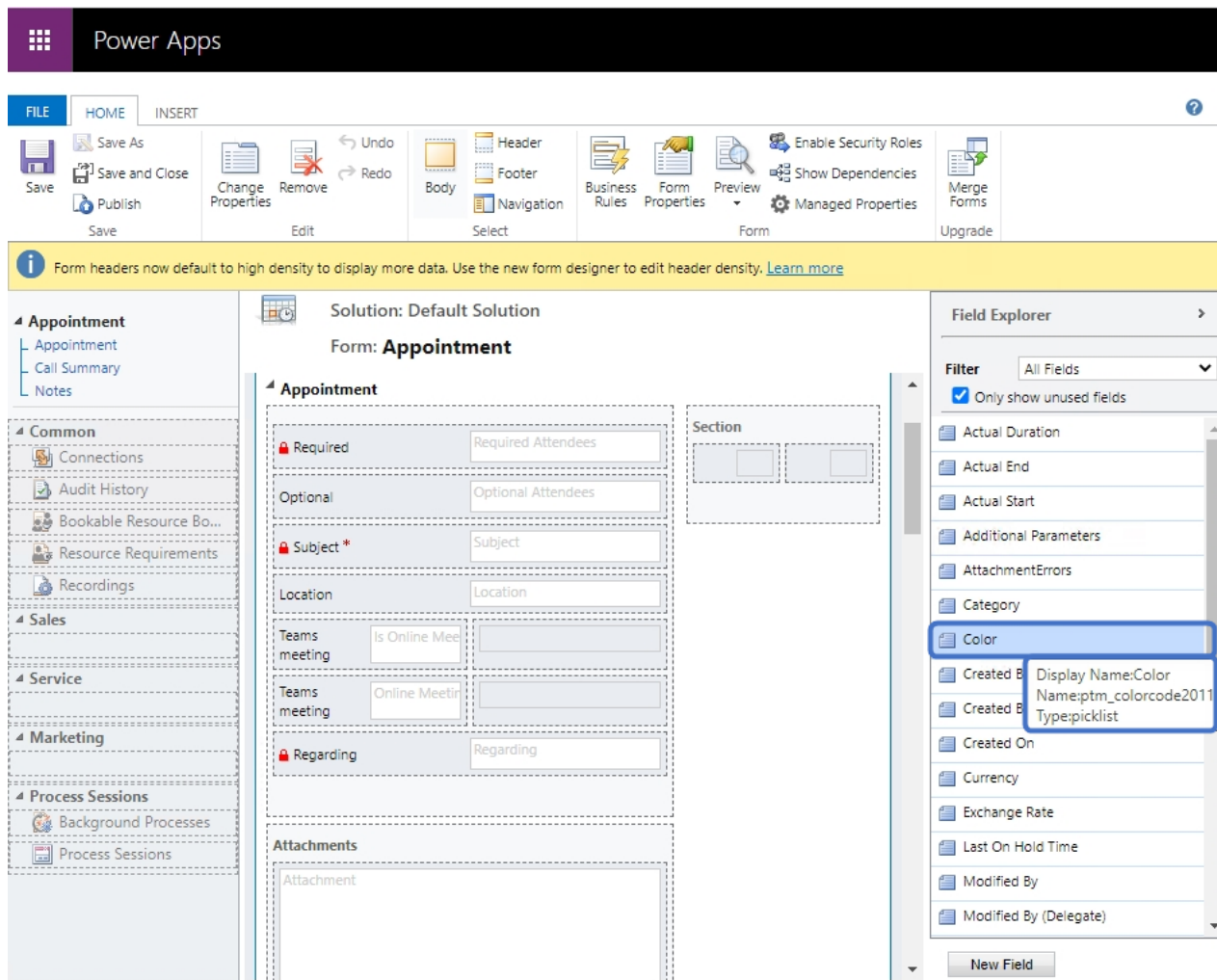


Figure 56: Color field with description

- 5) Once you have dropped the *Color*-field at a convenient place, please click on the **[Save]**-button. Then click on the **[Publish]**-button.

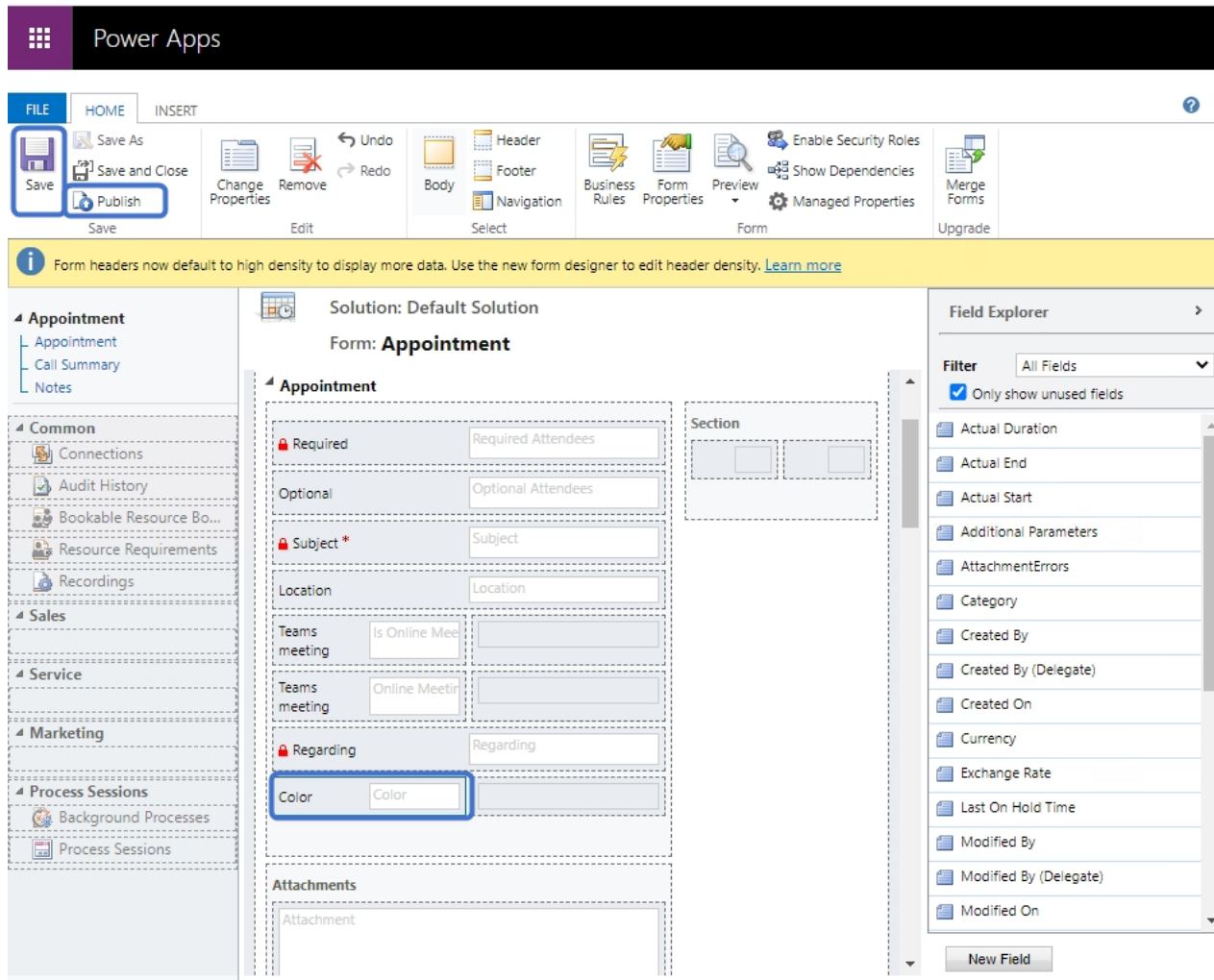


Figure 57: Save and publish your customization

- 6) The result: From now on, the color-drop-down-menu will appear within the appointment entity when scheduling an appointment.

SMARTBAR DIALOG SAVE ✓ MARK COMPLETE SAVE & CLOSE RECURRENCE FORM POWERSEARCH

APPOINTMENT

New Appointment

Required --

Optional --

Subject* ✘ --

Location --

Regarding --

Color

- Peach
- Yellow
- Dark Orange
- Green
- Green Yellow

Attachments

Figure 58: The Color-Coding functionality has now been added to the appointment entity

10.2 How to add non-standard colors to GroupCalendar

Adding further colors than the default ones to GC is usually no problem. Nevertheless, there are a few prerequisites you should take care of.

First of all, make sure that you know the HEX Code of the color you would like to add. (There are several free online color picker tools, like www.colorpicker.com)



The following step-by-step instruction describes how to add additional colors to the appointment entity. But: You can apply Step 1 – 8 (with the exception of selecting another *activity type* and *activity type color code* than appointment) to any other activity.

However, these are different color settings for the different activities:

- TaskColorCode
- ServiceAppointmentColorCode
- EmailColorCode
- PhoneCallColorCode
- FaxColorCode
- LetterColorCode
- AppointmentColorCode

In tutorial, we will add a light grey color with the hex code #E0E0E0.

- 1) Open your CRM and navigate to Settings > Customization > Customize the system.

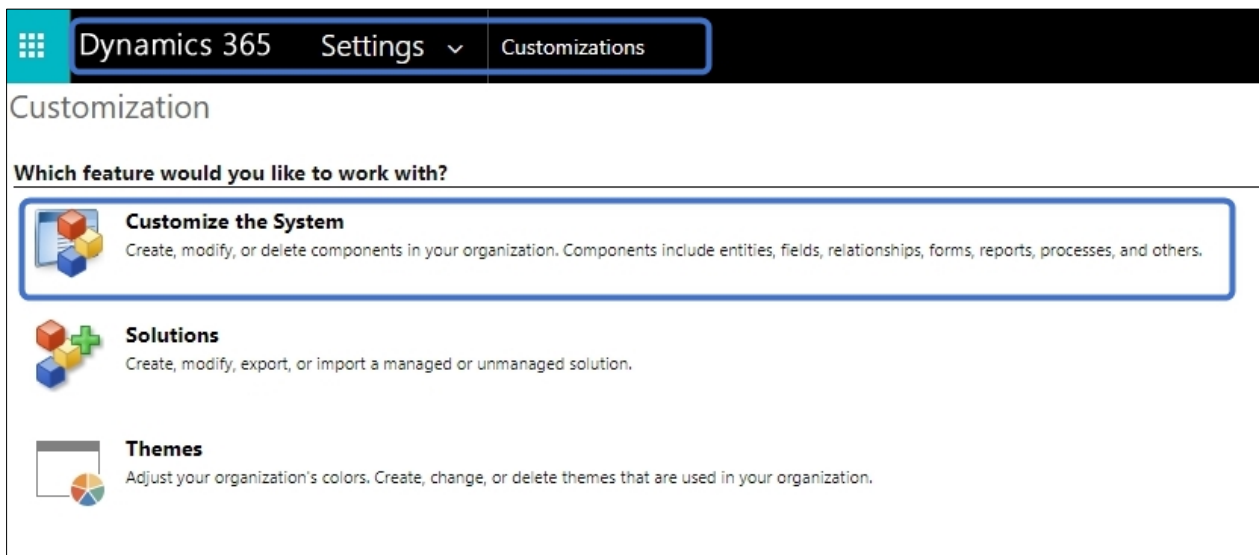


Figure 59: Customize the system

- 2) In the so opened window, click on *Entities* and double click on the entity *Appointment*. (If you want to apply this step to another entity, simply select the entity you want to customize)

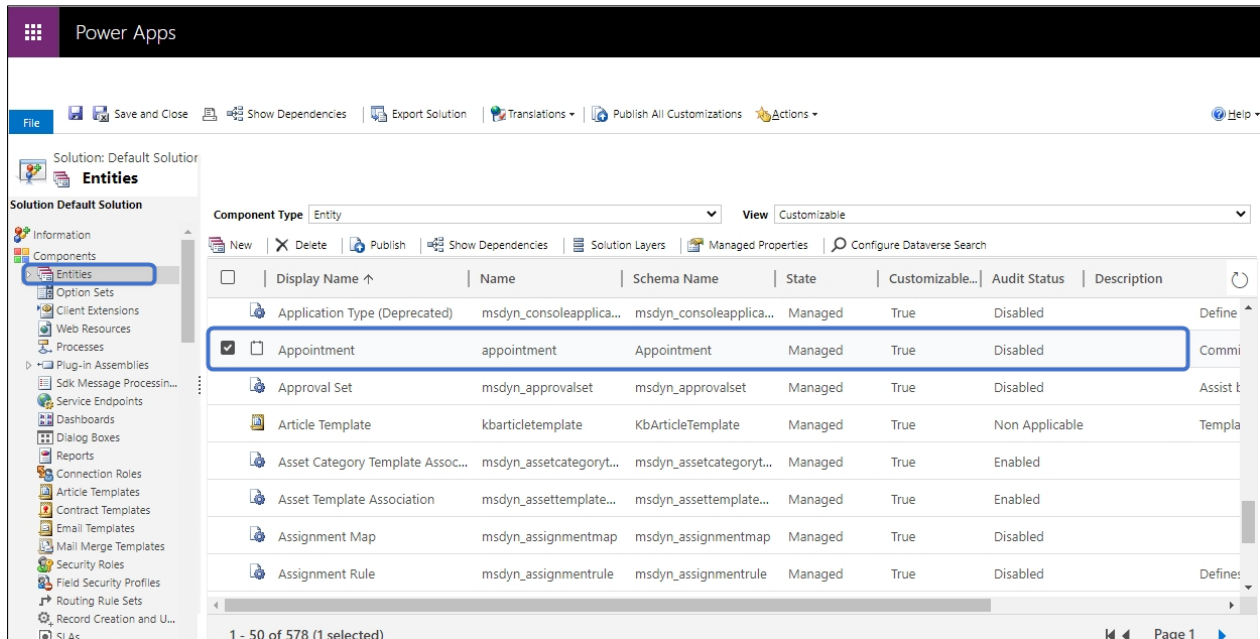


Figure 60: Default Solution > Entities > Appointment

- 3) In the so opened *Appointment* entity settings, click on *Fields* in the menu on the left and you will receive a list with all the fields of the entity. Double click on the *ptm_colorcode2011* field.

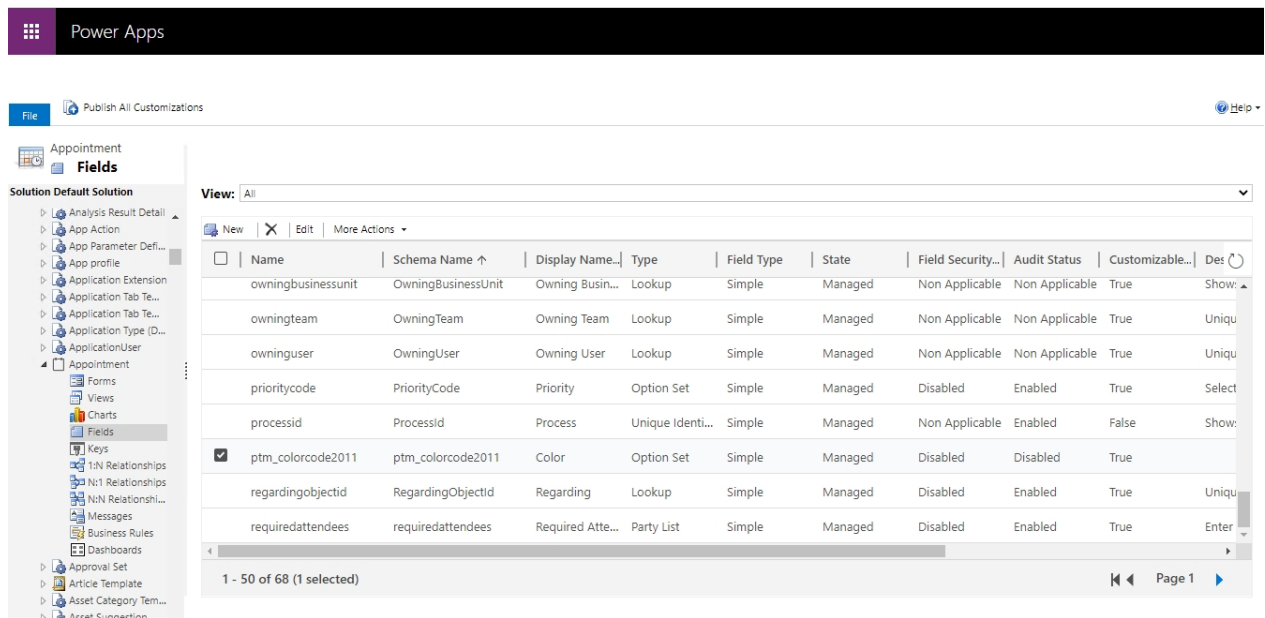


Figure 61: Open fields > ptm_colorcode2011

- 4) In the so opened window, click on the **[Add]**-button (the green plus-sign) ① in the *Options*-area and type in the label of the color (the name to be displayed in the color drop-down-menu). For the color we add, we use the name *light grey*. ②

It is important that you remember the color-value that is defined by your CRM system. In this example, the value is *100.000.001*. ③

Finally, add the HEX Code ④ and the newly added color will be visible in the standard color list ⑤.

As soon as you have finished your customizations, click on the [Save and Close]-button in the Command bar. ⑥

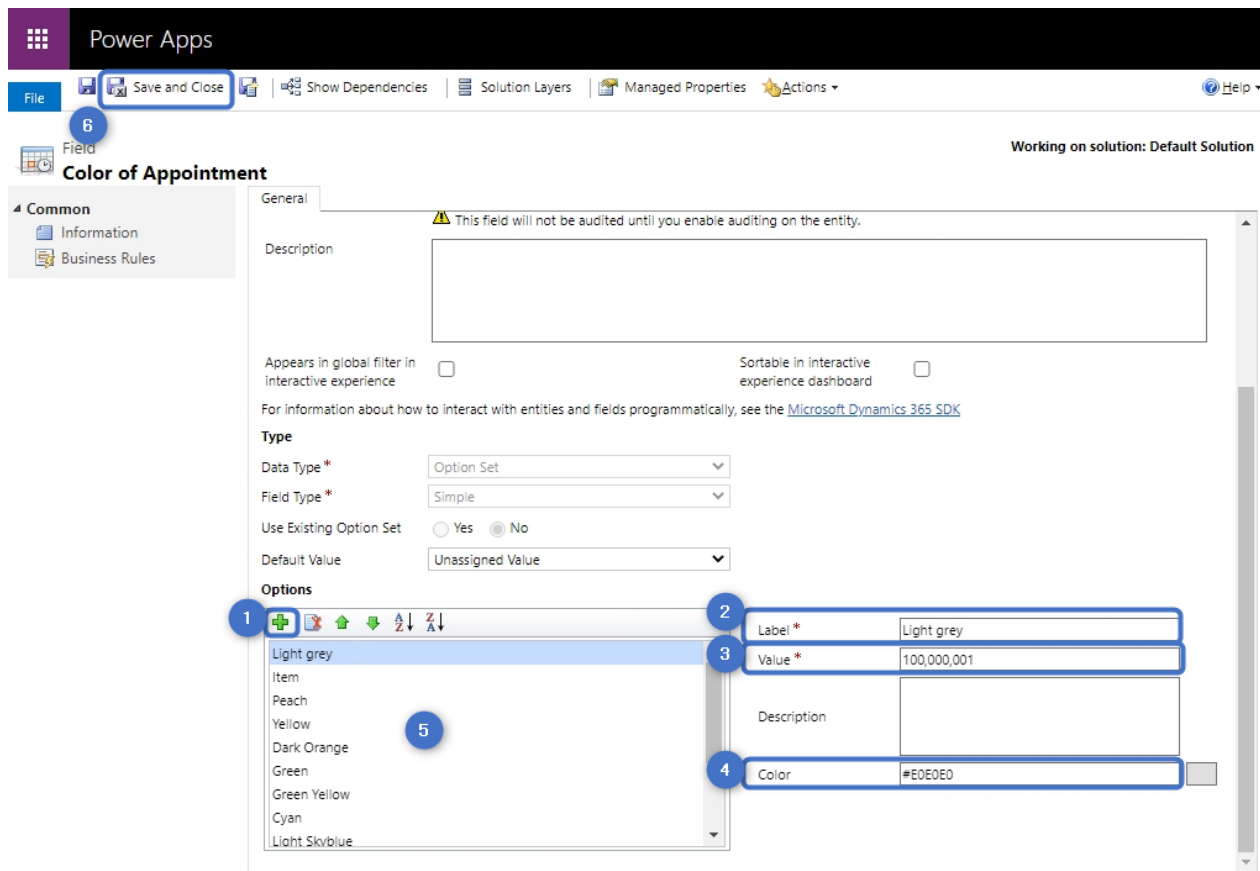


Figure 62: Add colour

- Please do not forget to click on the **[Publish All Customizations]**-button. Once the customizations have been published, close the window.

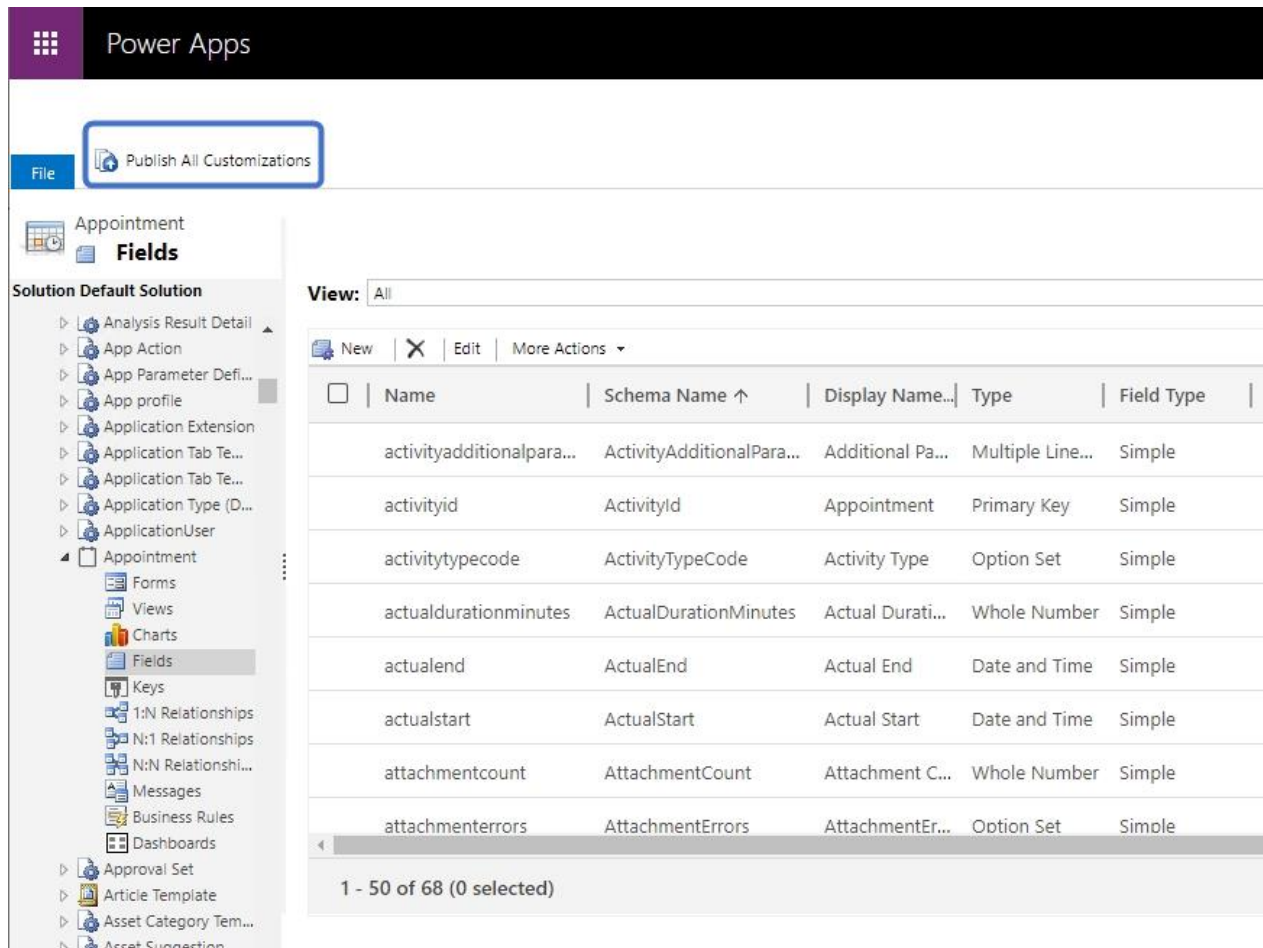


Figure 63: Publish the customizations

- 6) Next, go back to the *Settings* section of your Dynamics 365 and open the *MSCRM-ADDONS.com Products*. In the so opened window, double click on *GroupCalendar* within the product list.

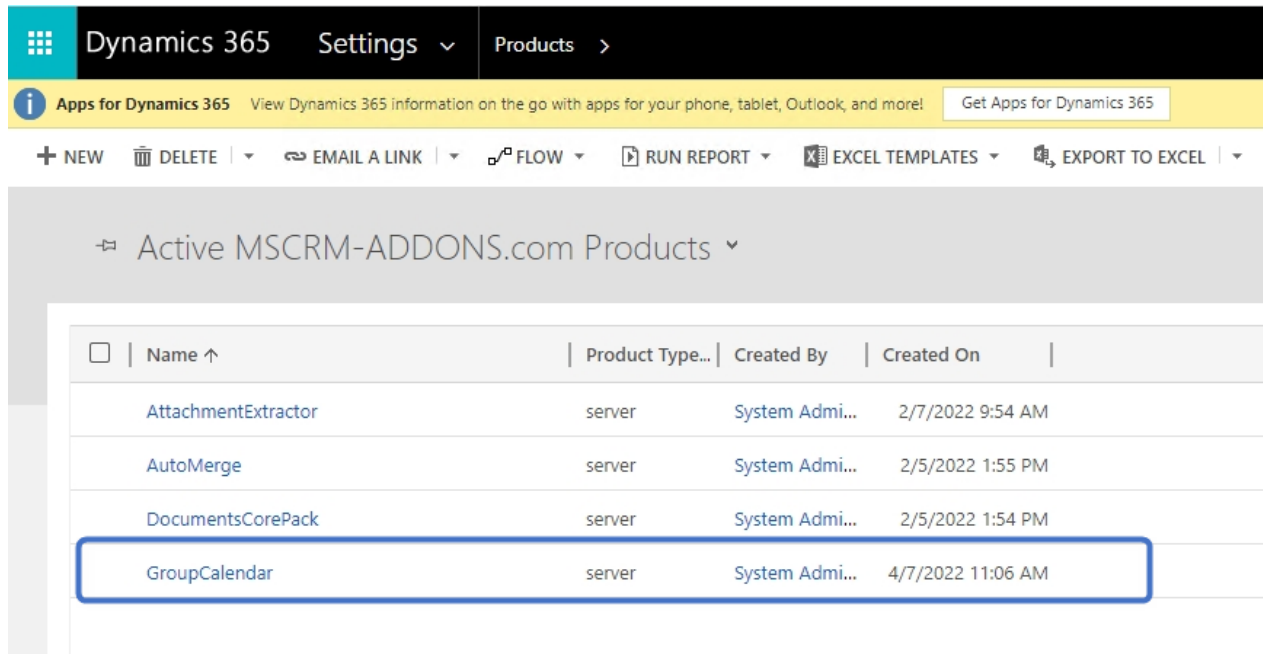


Figure 64: GC Settings > MSCRM-ADDONS.com Products > GroupCalendar

- In the so opened *GroupCalendar Settingskeys*, look for *AppointmentColorCode* and open it with a double-click.

MSCRM-ADDONS.COM PRODUCTS : INFORMATION

GroupCalendar ☰

General

Name *	GroupCalendar	Subscription Number
Product Type	server	Scheduler

Active MSCRM-ADDONS.com Settingsk... ▾

Search for records

Name ↑	KeyValue	IsCached	Created On
AdditionalAttributes	<AdditionalAttributes> <Entity name="appoi...	Yes	4/11/2022 10:...
AllowExport	true	Yes	4/7/2022 11:5...
AppointmentColorCode	1 #FFDAB9;2 #FFFF00;3 #FF8C00;4 #00FF0...	Yes	4/7/2022 1...
BuildNr	p67rwWgrU/dRZ/i6DtYZ/AGLpfYRNszPBNqZ...	Yes	4/7/2022 11:0...
CalendarWeekRule	FirstFourDayWeek	Yes	4/7/2022 11:5...
cbxactstart	true	Yes	4/7/2022 11:5...

Figure 65: GroupCalendar settingskeys - AppointmentColorCode



The color settings depend on which activity you want to add:

- TASK > TaskColorCode
- SERVICEAPPOINTMENT > ServiceAppointmentColorCode
- EMAIL > EmailColorCode
- PHONECALL > PhoneCallColorCode
- FAX > FaxColorCode
- LETTER > LetterColorCode
- APPOINTMENT > AppointmentColorCode

- 8) However, in the so opened window, you must add your color to the *KeyValue*-area. To do so, add the following structure to the existing colors:

COLOR VALUE|**HEXCOLOR**;
COLOR VALUE|HEXCOLOR; COLOR VALUE|HEXCOLOR;

This is how it looks like in our example:

10000001|**#E0E0E0**



Please make sure to separate the single colors by using a *semicolon (;)*
AND: Do not forget to save your changes!

MSCRM-ADDONS.COM SETTINGSKEYS : INFORMATION

AppointmentColorCode

General

Name *	AppointmentColorCode
IsCached *	Yes
KeyValue	1 #FFDAB9;2 #FFFF00;3 #FF8C00;4 #00FF00;5 #ADFF2F;6 #00FFFF;7 #87CEFA;8 #6495ED;9 #778899;10 #A020F0;11 #FFB6C1;12 #FFE4E1;13 #10000001 #E0E0E0

Figure 66: GroupCalendar settingskeys with added color

- 9) Once saved, refresh your browser with F5 and navigate back to GroupCalendar to create a new appointment. You will find the new color added and ready to be used.

New Appointment - Unsaved
Appointment · Appointment ▾

Appointment

Required	---
Optional	---
Subject	* Sales meeting
Location	---
Regarding	---
Color	--Select-- ▾
	--Select--
	Light grey
	Item
	Peach
	Yellow
	Dark Orange
	Green
Attachments	

Figure 67: GroupCalendar: new color added to appointment

10.3 How to custom columns in the user list

This step-by-step tutorial outlines how to custom columns in the user list.

- 1) Open your *CRM Settings > Customizations > Customize the system*. In the so opened window, open the *Entities*-drop down menu **1**, scroll down to *User* **2** and double click on *Views* **3**. At the right side, click on the **[New]**-button **4**.

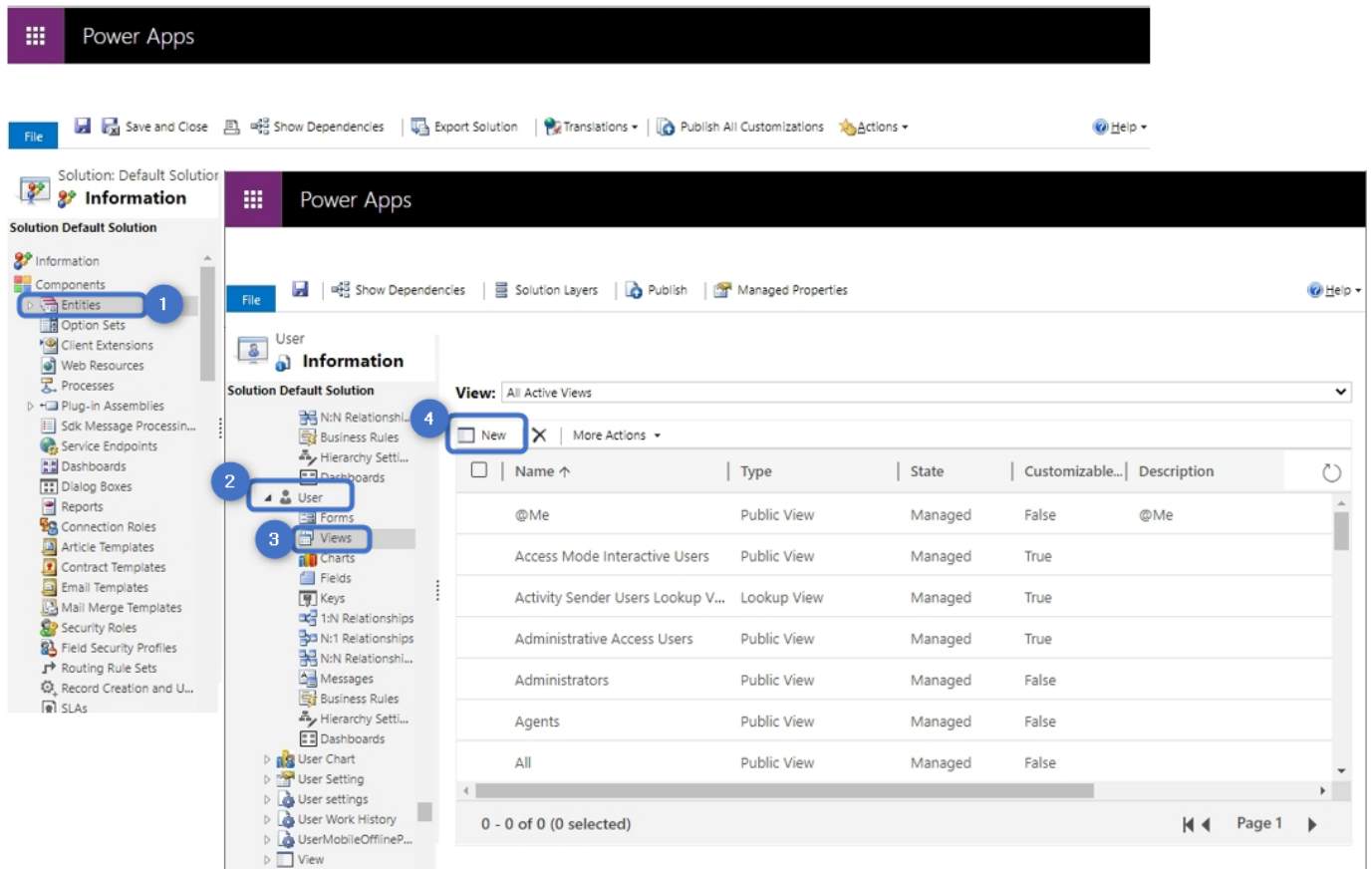


Figure 68: GroupCalendar: new color added to appointment

Within the next window, you can define your view. Specify the number, the width and the sorting of the columns you need. The next steps outline how to do so.

- 2) As soon as you have clicked on the **[Add New]**-button, the *View Properties*-window opens. Enter a random name for your new view (here: GroupCalendar Gantt View) and click on the **[OK]**-button. You could also add a description, but adding it is optional.

View Properties [X]

Provide Information for This View
Provide a name and description for this view. For public views the name will be visible to users in the View list.

Name *

Description

Figure 69: GroupCalendar: view properties window

- 3) Clicking on the **[Add Columns]**-button in the menu in the box at the right side enables you to add and/or customize your columns.

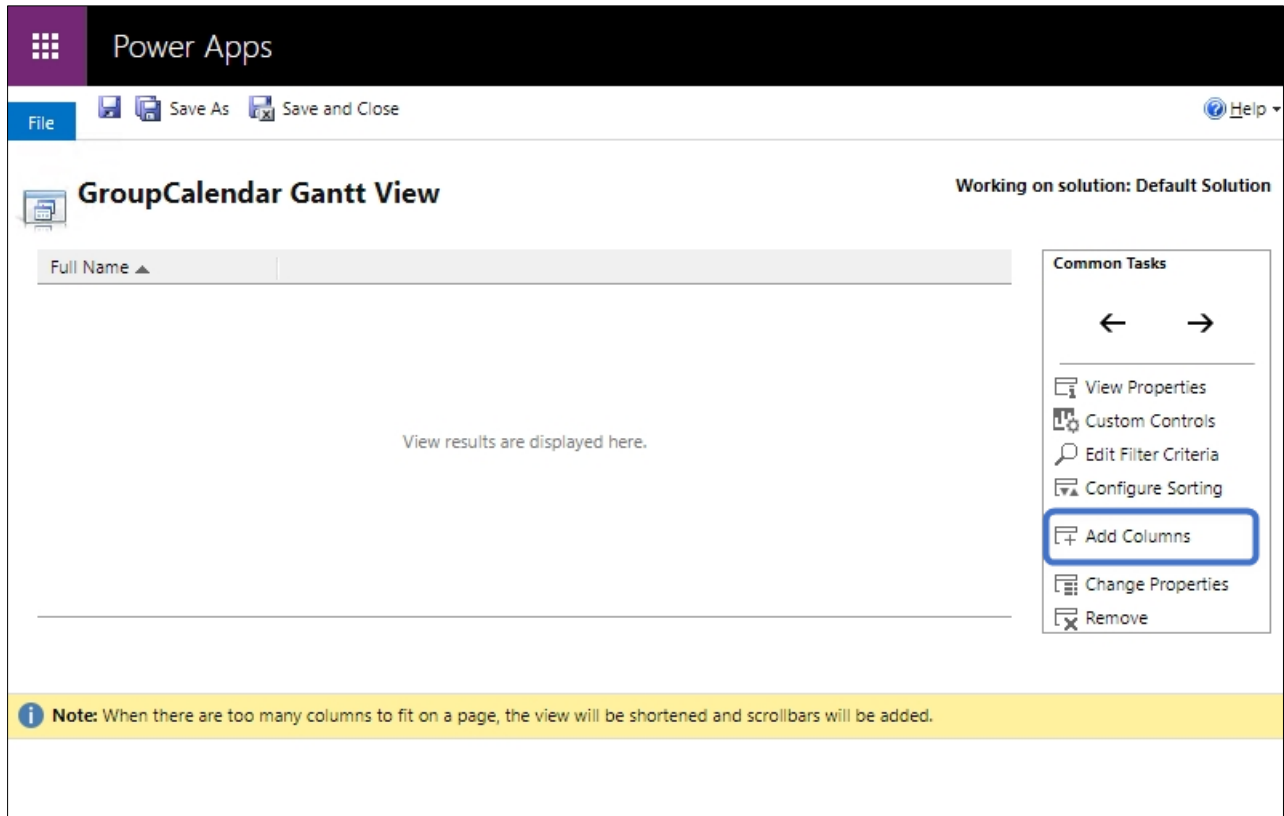


Figure 70: Add columns

- Simply check the checkboxes at the left side next to the items you want to add to the columns and click on the **[OK]**-button.

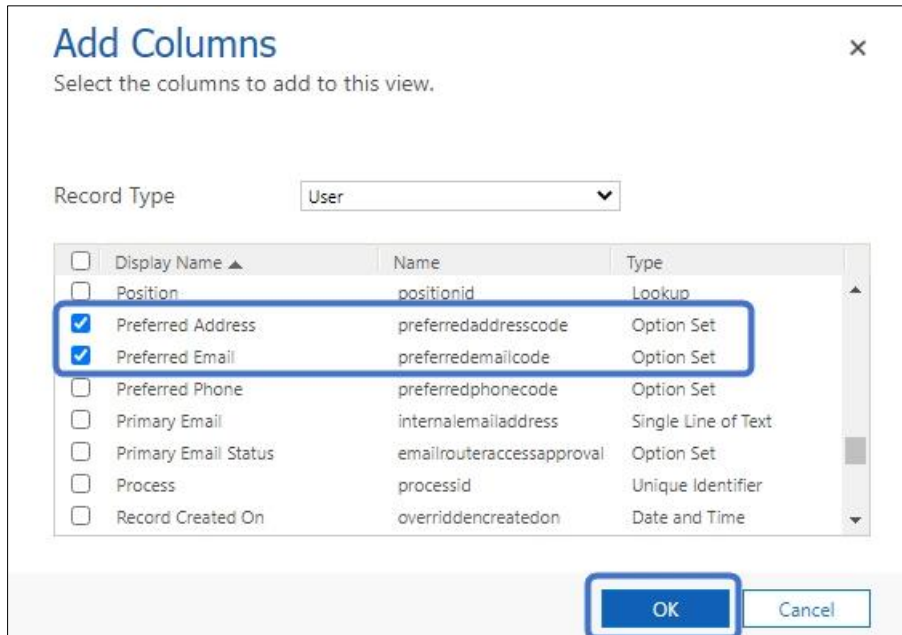


Figure 71: GroupCalendar – define columns

- 5) The single columns are now displayed in the previously created *GroupCalendar Gantt View* (here: Full Name, Address, First Name, Preferred Phone, Primary Email). To configure the sorting of your columns, select the one you would like to configure and click on the **[Configure Sorting]**-button in the box at the right side.

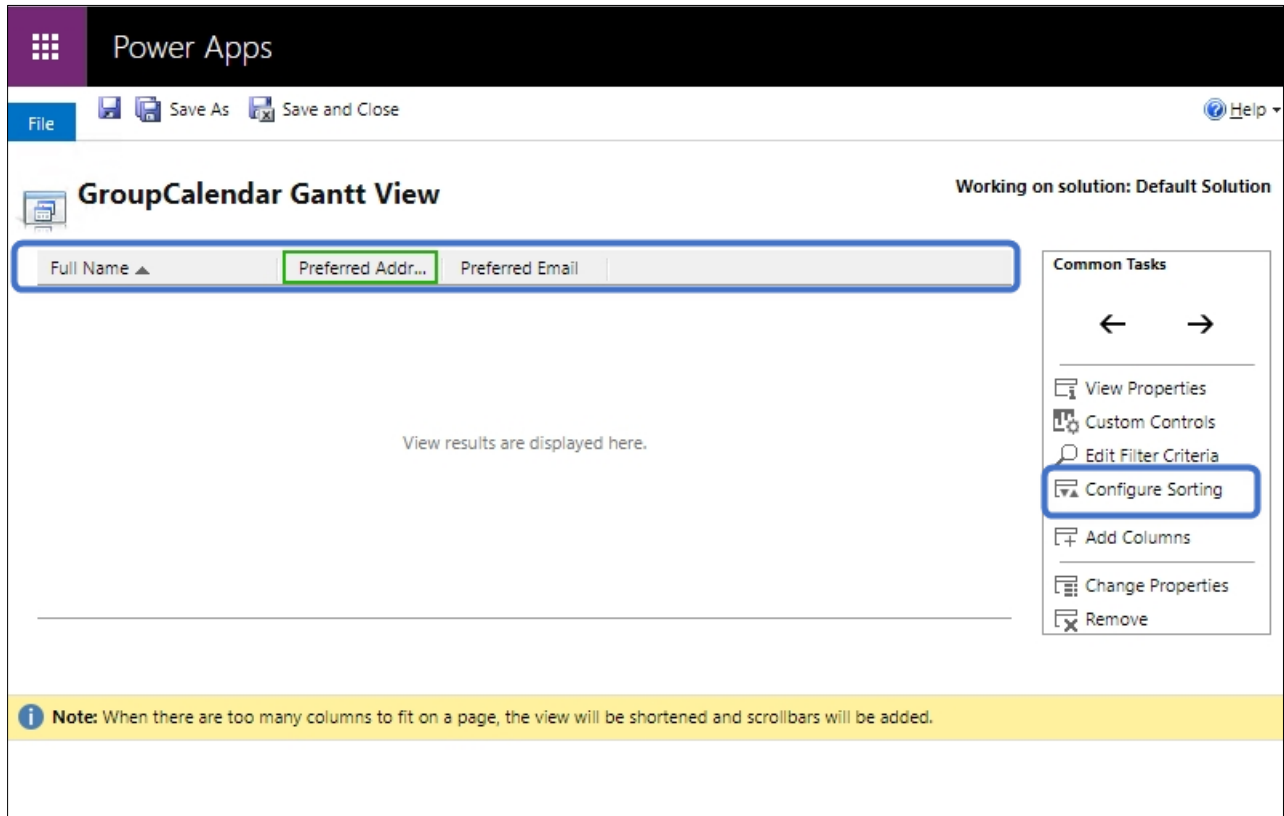


Figure 72: GroupCalendar – configure sorting of columns

- 6) In the next window, you can configure the sorting of the boxes after the criteria shown in figure 65. Click on the **[OK]**-button in order to finish the process.

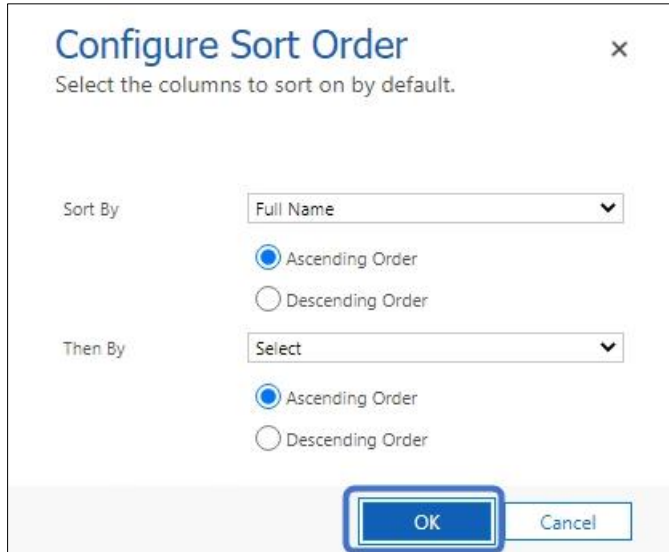


Figure 73: GroupCalendar – configure sorting of columns II

- 7) To proceed, you need the unique ID of your newly created view. To get it, simply copy your address bar to an editor or elsewhere. The unique ID is the highlighted part of the example address bar below:

<http://crm:5555/Std/tools/vieweditor/viewManager.aspx?appSolutionId=%7bFD140AAF-4DF4-11DD-BD17-0019B9312238%7d&entityId=%7b60696D5D-4D78-4712-B4E0-6CBEF3DF4906%7d&mode=new&objectTypeCode=8#>

- 8) With the so received unique ID, create a new SettingsKey named GanttUserTemplateID. For further information on how to create a settingskey in GC, have a look at [CHAPTER 4 GROUPCALENDAR SETTINGS ON PAGE 28](#) or read [this post](#) on our blog.

The settings of the new SettingsKey are as follows:

Name: *GanttUserTemplateID*

KeyValue: *unique view ID*

IsCached: *YES*

10.4 How to show working hours and Time-Off

It is possible to show working hours and time off (e.g. holidays) for each resource and user in GroupCalendar. The feature is not enabled per default, but it can be enabled easily. Simply create a new EnableWorkingHours settingskey as shown below in order to enable the functionality.

First of all, you will have to create a new settingskey. If you haven't created a settingskey yet, please read this [blog article](#). Please enter the following values:

Name*: EnableWorkingHours

IsCached*: Yes

KeyValue: true

The screenshot shows the 'New MSCRMS-ADDONS.com Settingskeys - Unsaved' form. The 'Save & Close' button in the top toolbar is highlighted with a blue box. The form has two tabs: 'General' and 'Notes'. The 'General' tab is active and contains the following fields:

Name	* EnableWorkingHours
IsCached	* Yes
KeyValue	true
Product	---

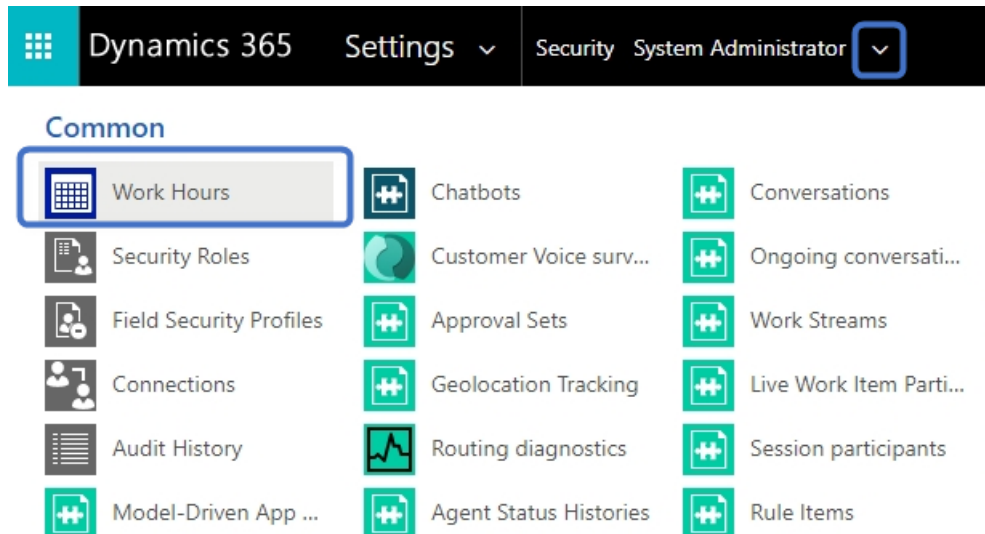
Figure 74: New settingskey

Do not forget to save the settingskey!

To apply the changes, you have to run a IISRESET on the CRM server.

Optionally, you may restart the GroupCalendarServer Application Pool within IIS on the CRM server.

Next, navigate to Settings > Security > users and select a user there and click on the marked arrow. An overview opens, click on Work Hours.



In the so opened surface, open the drop-down menu next to the **[Set up]**-button ① and set your working hour schedule ② in the so opened window. Once saved, your changes will apply to GroupCalendar.

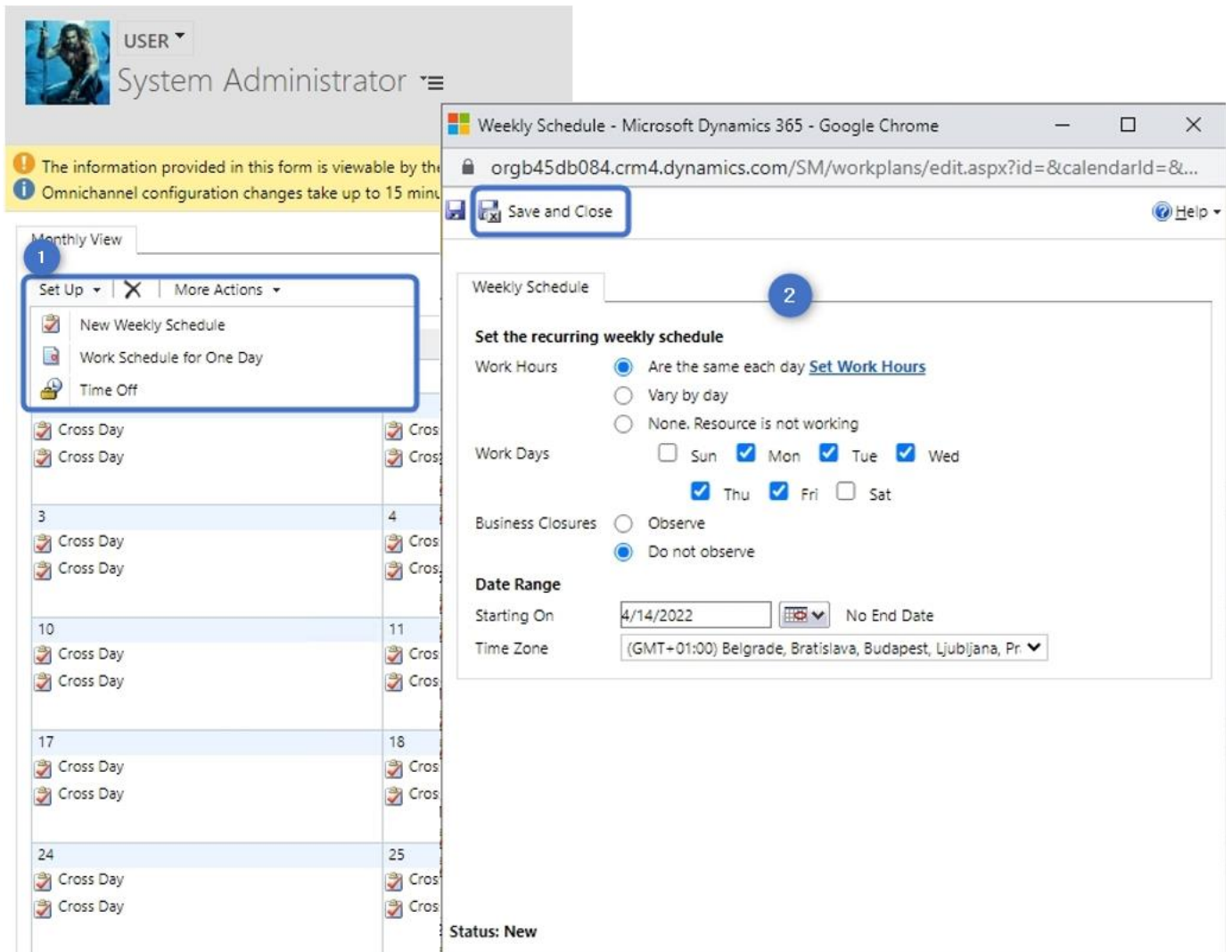


Figure 75: Open the work hours surface

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

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