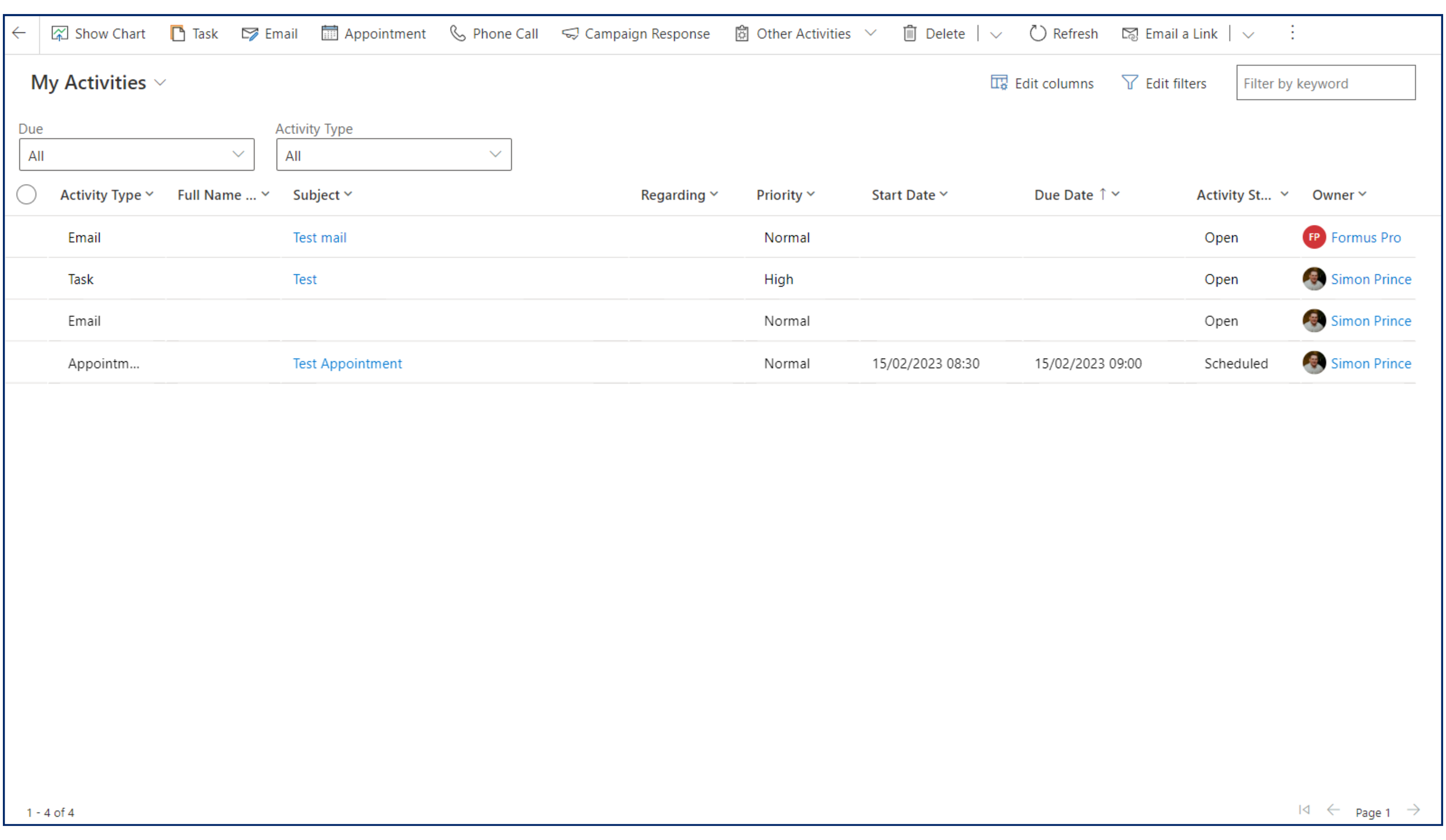
Dynamics

DY102.2 - Activities Screen Overview

TECHNOLOGY WITHOUT LIMITS

In this document, we will take a look at the parts of the Activities screen and what they do.

It will only take a look at the elements that appear when navigating to activities using the sidebar menu.



The Top Menu

Back Button

Returns you to the previous screen or record.

Refresh

Updates the list of activities on the screen.

This is useful if someone assigns you an activity; this will refresh the list to show it.

The Three Dots

This is where hidden menu items go. When working on smaller screens, some options will hide under this menu option.

All other options on the top menu should not be used. They will create activities, but these will not be linked to an Organisation.
Dynamics is not to be used to create your personal calendar items or internal emails.

My Activities

The my activities page can be seen as a to-do list. All upcoming appointments, tasks and any unsent emails will sit in this view.

My Activities

This is the view selector. This will allows you to switch between different sets of data.

Due Filter

This allows you to filter your activities based on their due date.

Activities that do not have a due date will not be shown unless set to 'All'.

Activity Filter

This allows you to filter your activities by the activity type.

Note that some of the options in this list are not used in our version of Dynamics.

Edit Columns

This option allows us to add more columns to the data we see.

This is primarily used for creating custom views.

Edit Filters

This option allows us to changes the filters for the current view.

This is primarily used for creating custom views.

Filter Bar

This option allows us to search the data in the current view.

It will not search for data that is not shown in the current view.

Select

When you hover over each activity on the screen you will see this option. It allows you to select the activity.

The top circle allows yuo to select all activities on the page.

Column Filter

The down arrow next to each column heading allows you to, when clicked, sort and filter by each column.

This will be used when creating custom views.

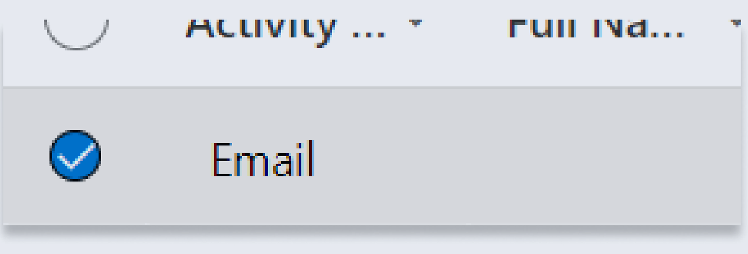
Page Navigation

When you have more than 50 entries on a page, the data will start to go across the pages.

Use the arrows to move between pages.

Top Menu on Select

When you select an activity, using the circle on the left-hand side, the top menu changes to give us more options. This section will explore the different options you can use.



Edit

This allows you to edit the activity.

You can also go into edit mode by double clicking any blank space on the row.

Delete

This should be used in extreme cases only.

We should only delete an activity when it was created by mistake.
We should not delete an activity that has been cancelled.

Mark Complete

When an activity has been completed, use this option to remove it from your activities list.
Completing activities is good housekeeping and will allow you to see the activities you have left to do.

Cancel

When an activity is no longer needed, or has to be rescheduled, you should cancel the original activity.

Cancelling allows us to see patterns in behaviour.

Assign

This allows us to transfer an activity to another user.

This should be used when you raise an activity for someone else, or someone else is taking ownership of it.

Email a Link

This is useful for sharing activities with other users, without giving up ownership.

Can be useful for getting input from someone else.

All other options on the top menu should not be used.

Task: Play

Take some time to press all the above options to become familiar with the system.

As long as you are in the testing site (Orange banner at the top) you cannot break anything.

For further Dynamics guides, make sure to check out the Digital Systems page on the hub.

This page can also be used to access an array of other learning material.

For further help, reach out to systemstraining@dofe.org