This document will comprehensively cover the Timeline feature in Dynamics. We will explore the options available on the Timeline and on the individual records as well.

## Timeline

The timeline feature will be visible in multiple locations within Dynamics. Its primary purpose is to enable users to create notes and activities associated with specific records.
While certain features may be specific to the record you're currently working on, this guide will focus on the features that are universally available across all Timelines.
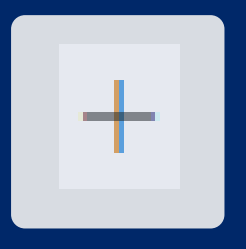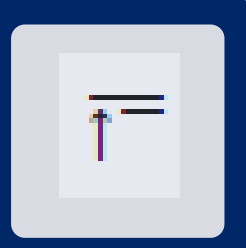
### New Activity

This option permits you to generate a fresh activity within the Timeline. The available choices on this menu may vary depending on the specific record you are currently viewing.
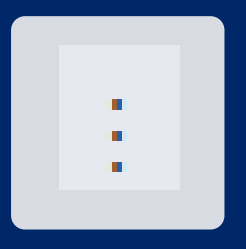
### Filter

Enables you to filter out specific entries on the timeline. This can be done based on the type of activity or the creator of the activity.
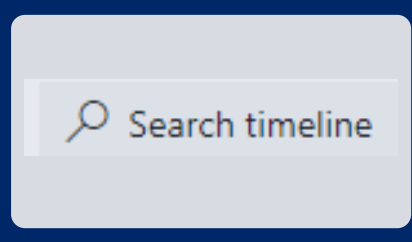
### Expand/Contract

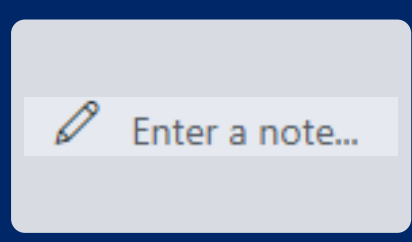Theis allows you to show or hide more detail on each of the posts.

### Additional Options

By clicking on the three dots, you can access a range of other timeline options, including sorting and the ability to group emails if desired.

### Search

The search feature allows you to search through all activities on the timeline.
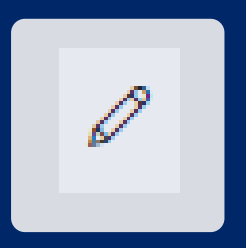
### Enter a note...

By default, all timelines will have this as an option. This is a quick way for creating a note.

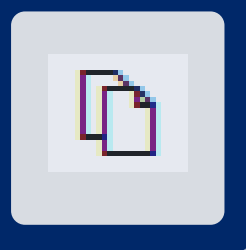However, some apps may choose to have a different option here.

## Activity Options

Each activity on the timeline will have some quick options to perform.
These are shown on the right of the entry.

### Edit

This option is exclusively visible for notes, providing the ability to edit the contents of the note.

### Copy Text

This particular feature is exclusively available for notes. It facilitates the copying of text from the note to your clipboard, enabling you to paste it in other locations, even outside of the Dynamics environment.

### Pin

This feature is exclusively accessible for notes and serves the purpose of pinning a note to the top of the timeline. This can be quite handy for highlighting and keeping important information readily visible.

### Delete

This feature should be used sparingly. It results in the permanent deletion of an activity from the timeline and should only be employed in cases where an activity has been created in error.
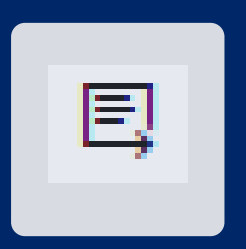
### Assign

This will allow you to assign an activity to another person or team.

### Add to Queue

This function enables you to assign an activity to a queue. It's worth noting that we are not currently utilizing queues within Dynamics.

### Open Record

This function allows you to open the activity fully, providing access to view and edit all the details of that specific activity.

### Mark As Complete

This function enables you to mark the activity as complete or cancel it. Once you take this action, the activity will transition into read-only mode.

## Task: Practice

Please take some time to explore and use all the options mentioned above to become familiar with the Timeline.
Rest assured, while you're in the testing site (identified by the orange banner at the top), there's no risk of causing any unintended changes or issues.

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