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3.04.3 Group Organizer "Team-Calendar"

The group organizer manages project relevant appointments (milestones, external and internal appointments, project actions) and person-related events (absences, such as holidays and illness, bank holidays, general operations, ...). The calendar can be opened for the user, the group (such as unit) or for all the employees for any period of time. With the appropriate permissions, appointments can not only be displayed, but also be defined.

Bank holidays, absences, milestones and open actions are transferred from the appropriate record data in the system. Appointments can be freely defined (with sufficient permission). In addition, the scheduled employees to these appointments can be notified through the internal mail system Mailer.

The calendar is opened through the toolbar.

The screenshot shows the 'Ihre Termine' (Your Appointments) view in the Projectile Group Organizer. The interface includes a menu bar with options like 'Datei', 'Ansicht', 'Erfassung', 'Unternehmensbereiche', 'Tools', 'Ablage', and 'Fenster'. A toolbar contains various icons, including a calendar icon. The main content area has tabs for 'Standardansicht', 'Modulansicht', 'Termine', 'Portfolioreport', 'Projektliste', 'Risikomanagement', 'Vertrieb (charts)', 'Vertrieb (reports)', 'Projekte', 'Kunden', and 'Mitarbeiter'. The 'Termine' tab is active, displaying a calendar view with the following appointments:

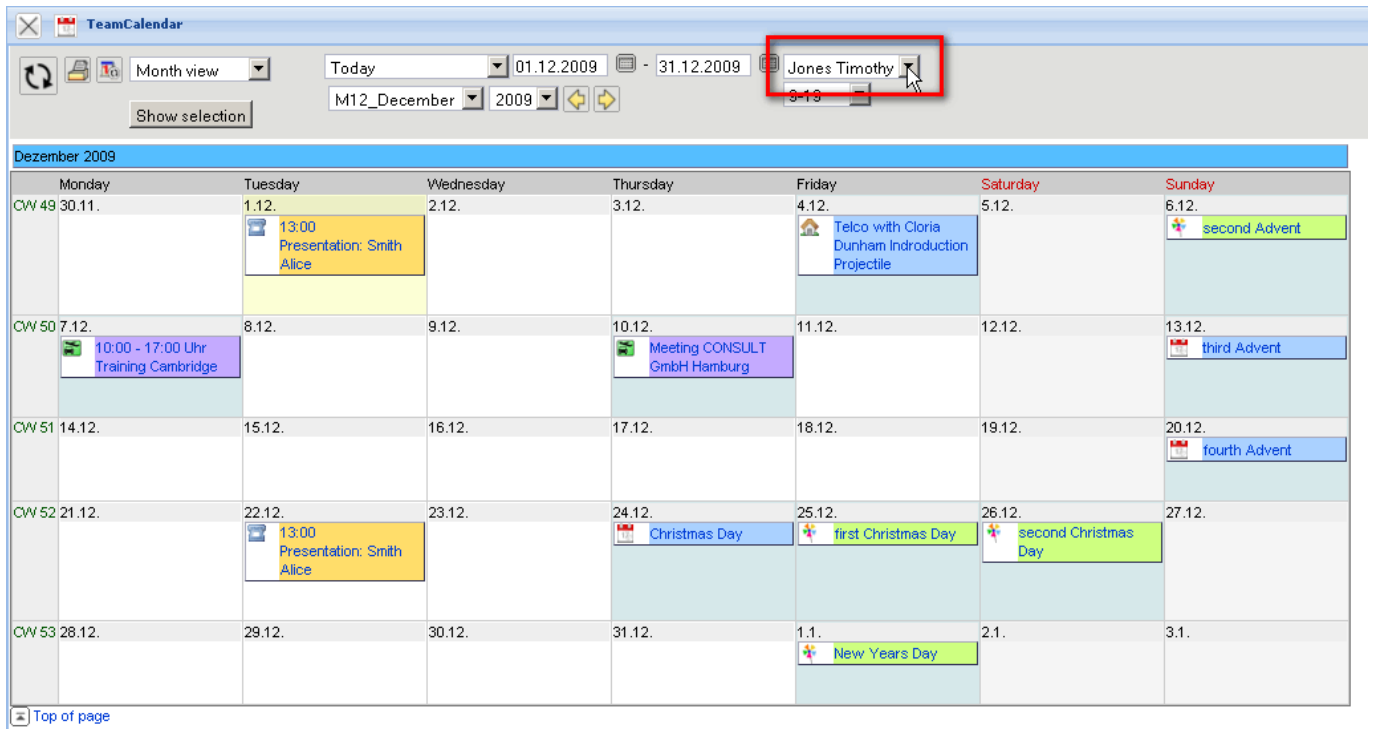
Kategorie	Datum	Terminbeschreibung	Werkzeuge
Überfällig	Di, 19.12.2006	To-Do-Liste für Einführung	[Icon] [Icon]
Überfällig	Di, 19.12.2006 09:00	1 - Erfasst 19.12.2006 09:00:00 Rechtegruppen anlegen	[Icon] [Icon]
Überfällig	Mi, 20.12.2006 09:00	1 - Erfasst 20.12.2006 09:00:00 Mitarbeiterdaten importieren	[Icon] [Icon]
Überfällig	Mi, 20.12.2006 16:00	1 - Erfasst 20.12.2006 16:00:00 Kontaktdaten importieren	[Icon] [Icon]
Überfällig	Fr, 29.12.2006 12:00	Präsentation Meier Gabi Version 3.1 Engineering	[Icon] [Icon]
Heute	Di, 02.01.2007	Urlaub	
Heute	11:28	Aktion 1.1-16 Nahl Lisa Kontaktpflege	[Icon] [Icon]
Heute	11:40	Kontaktpflege Nahl Lisa Projektstatus abgleichen	[Icon] [Icon]
Morgen	Mi, 03.01.2007	Urlaub	
Demnächst	Do, 04.01.2007	Urlaub	
Demnächst	Fr, 05.01.2007	Urlaub	
Demnächst	Mo, 08.01.2007	Informationsmaterial Stutzer Jochen Anforderungskatalog ausfüllen	[Icon] [Icon]
Demnächst	Mo, 08.01.2007	Abnahme Planung	
Demnächst	Mo, 08.01.2007	Arbeitspaket - Plan-Ende : 93.1-1 Konzeption	
Demnächst	Mi, 10.01.2007 13:00 - 17:00	Besprechung CONSULT in Hamburg	[Icon]

In the following example, the calendar of the user !!!!! is open for the current month.

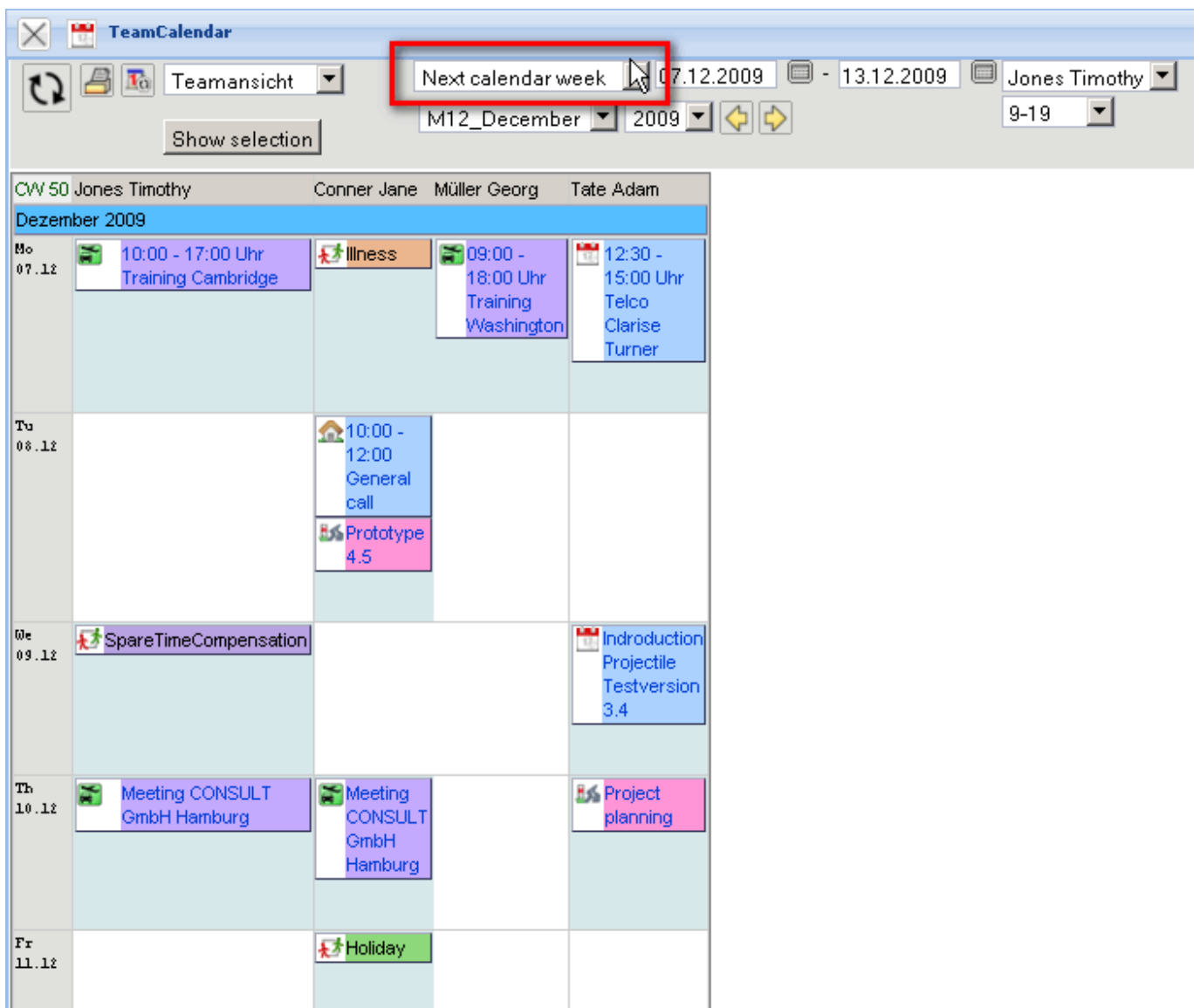
All appointment types (including milestones) are displayed, the black entries from the defined actions and the purple entries have been defined in the calendar itself.

New Year	Green entries are used from the bank holiday definition (see bank holidays)
13:00 Presentation: Smith Alice	Yellow entries are from the contact administration (see actions).
10:00 - 12:00 General call	Blue entries are from internal appointments.
Meeting CONSULT GmbH Hamburg	Purple entries are from external appointments.
Programming	Pink entries are personal milestones of the employee (see milestones).

The calendar supports and displays (with appropriate permission) also the appointments of other employees.

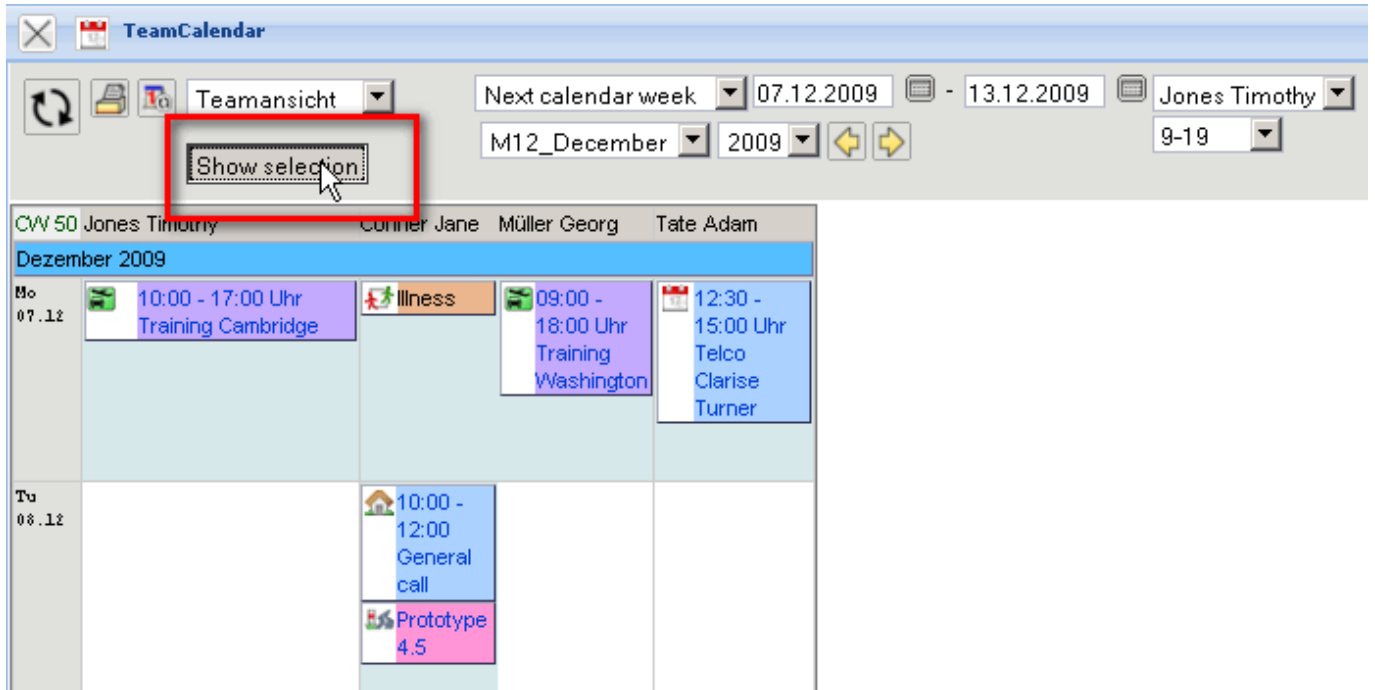


In the calendar the time interval of the display can also be changed (here in team overview).



Sa 12.12				
Su 13.12	third Advent	third Advent	third Advent	third Advent

By using the action "Show Selection" the settings of the calendar can be viewed and changed.




The selections "Employee" and "Units" provide filters for individual employees or units (organizational units, such as departments), and the selection "Entry" can filter the entries by the type of dates.

The screenshot shows the TeamCalendar application window. At the top, there are navigation controls including a refresh button, a 'Teamansicht' dropdown, and date selection fields for 'Next calendar week' (07.12.2009 - 13.12.2009) and 'Jones Timothy'. Below these are 'M12_December' and '2009' dropdowns, navigation arrows, and a '9-19' dropdown. A 'Show selection' button is also present.

The main interface is divided into several sections:

- Further employees:** A list with a search icon and a highlighted entry 'Find available documents'.
- Units:** A table with a 'Description' dropdown and one entry: '1 Marketing and Sales'.
- EntryTypes:** A list of event types with checkboxes: Absence, Action, Holiday, Milestone, TimeEntry, and ToDo.
- Add invited:** A checked checkbox.
- Show scheduled holiday:** An unchecked checkbox.
- Column Headers:** Column1 (08:00:00), Column2 (11:00:00), Column3 (14:00:00), Column4 (17:00:00), Column5 (20:00:00), and Display (CHART).
- Calendar Grid:** A grid for 'Dezember 2009' with columns for employees: Jones Timothy, Conner Jane, Müller Georg, and Tate Adam. Entries include 'Training Cambridge' (10:00 - 17:00 Uhr) for Jones Timothy, 'Illness' for Conner Jane, 'Training Washington' (09:00 - 18:00 Uhr) for Müller Georg, and 'Telco Clarise Turner' (12:30 - 15:00 Uhr) for Tate Adam.

With  the display of the calendar is refreshed.

TeamCalendar

Teamansicht
Next calendar week 07.12.2009 - 13.12.2009
Jones Timothy

1 - 3 / 3

	Name	First name
1	Jane	Conner
2	Jones	Timothy
3	Tate	Adam

No entries

EntryTypes

- Absence
- Action
- Holiday
- Milestone
- TimeEntry
- ToDo

Add invited

Show scheduled holiday

Column1	Column2	Column3	Column4	Column5	Display
08:00:00	11:00:00	14:00:00	17:00:00	20:00:00	CHART

CW 50	Jones Timothy	Conner Jane	Jane Conner	Müller Georg	Tate Adam	CW 50
Dezember 2009						
Mo 07.12	10:00 - 17:00 Uhr Training Cambridge				12:30 - 15:00 Uhr Telco Clarise Turner	Mo 07.12
Tu 08.12		Prototype 4.5	Programming with Mileson James			Tu 08.12
We 09.12	SpareTimeCompensation				Indroduction Projectile	We 09.12

To view or change appointments, click on the appointments (here an appointment for !!! on the 10.01.2007 between 1 pm and 5 pm).

The screenshot shows the 'TeamCalendar' application window. At the top, there are navigation icons and a 'Month view' dropdown. The main area displays a calendar for December 2009. A meeting titled 'Meeting CONSULT GmbH Hamburg' on Thursday, 10.12.2009, is highlighted with a red box. Other events include 'Illness' on Monday, '10:00 - 12:00 General call' and 'Prototype 4.5' on Tuesday, 'Holiday' on Friday, and 'third Advent' on Sunday. The bottom of the window has a 'Top of page' link.

In the appointment document, the appointment, including all the information (and attached documents) can be viewed ...

The screenshot shows the 'Time entry Meeting CONSULT GmbH Hamburg 10.12.2009 00:00:00' document. The interface includes a menu bar with 'Document', 'Edit', 'View', 'Back references', and 'Actions'. Below the menu are tabs for 'Main', 'Invitations', and 'Files'. The main content area contains the following fields:

- Entry ID:** 30
- Name:** Meeting CONSULT GmbH Hamburg
- Category:** Extern (dropdown), Private (checkbox)
- Timespan:** From 10.12.2009 00:00:00 To 10.12.2009 00:00:00
- Inviter:** Jones Timothy
- Attendees:** Employees (dropdown), Unit (dropdown), SendInvitations (dropdown), and a list of attendees: Conner Jane and Jones Timothy (checkboxes).
- Agenda:** (empty text area)

... and they can be changed (here completion of the agenda).

The screenshot shows a web-based form for creating a time entry. The title bar reads "Time entry Meeting CONSULT GmbH Hamburg 10.12.2009 00:00:00". The form includes the following fields and options:

- Entry ID:** 30
- Name:** Meeting CONSULT GmbH Hamburg
- Category:** Extern (dropdown), Private (checkbox)
- Timespan:** From 10.12.2009 00:00:00 To 10.12.2009 00:00:00
- Inviter:** Jones Timothy (dropdown)
- Attendees:** Employees (dropdown), Unit: Marketing and Sales (dropdown)
- Send Invitations:** SendInvitations (dropdown)
- Attendee List:** A list of employees with checkboxes: Conner Jane, Jones Timothy, Müller Georg, Jones Timothy, Griffith Jean.
- Agenda:** 13:00 - 14:00 status and Project planning, 15:00 - 16:30 Interfaces, 16:30 - 17:00 further steps

If a new appointment has to be defined, click on the check-box in the selected day. Here a new appointment for the 16.01.2007 will be defined.

TeamCalendar

Month view | Next calendar week | 01.12.2009 - 31.12.2009 | Conner Jane

M12_December | 2009 | 9-19

Dezember 2009

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
CW 50	7.12. Illness	8.12. 10:00 - 12:00 General call Prototype 4.5	9.12.	10.12. Meeting CONSULT GmbH Hamburg	11.12. Holiday	12.12.	13.12. third Advent
CW 51	14.12.	15.12.	16.12.	17.12.	18.12.	19.12.	20.12. fourth Advent
CW 52	21.12.	22.12. 13:00 Presentation: Smith Alice	23.12.	24.12. Christmas Day	25.12. first Christmas Day	26.12. second Christmas Day	27.12.
CW 53	28.12.	29.12.	30.12.	31.12.	1.1. New Year	2.1.	3.1.

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Then, a new document of the type appointment opens. Here the basic values are now defined.

Time entry 16.12.2009 00:00:00

Document | Edit | View | Actions

Main | Invitations | Project

Entry ID: 37

Name: [Empty field]

Category: [Dropdown] Private:

Timespan: From 16.12.2009 00:00:00 To 16.12.2009 00:00:00

Inviter: [Dropdown] [Search] [Add] [Remove]

Attendees: Employees [Dropdown] Unit [Dropdown] [Add] [Remove] [Search]

Conner Jane

Agenda: [Empty field]

This includes the period of time (here, of 16.01.2007 9:00 to 12:00), the participants (with the possibility of multiple choice, (here the employees !!! and !!!!), the description/the name of the appointment, the category (internal/external), further notes and possibly external documents. The appointment will be saved ...

The screenshot shows a web-based form titled "Time entry 16.12.2009 00:00:00". The form is organized into several sections:

- Entry ID:** A text input field containing the number "37".
- Name:** A text input field containing "conference marketing strategy".
- Category:** A dropdown menu set to "Intern" and a "Private" checkbox which is unchecked.
- Timespan:** Two date and time pickers. The "From" field is set to "16.12.2009 09:00:00" and the "To" field is set to "16.12.2009 12:00:00".
- Inviter:** Two dropdown menus for selecting the inviter, with search and clear icons.
- Attendees:** A section titled "Attendees" with a sub-section "Employees". It features a dropdown menu, a list of employee names with checkboxes, and a "Unit" dropdown menu. The employee list includes "Conner Jane" and "Griffith Jean".
- Agenda:** A text area containing the text "product strategy, Homepage, Online-marketing, distribution partner".

... and is automatically accessible in the calendar. The assigned employees receive a message through the internal system.

TeamCalendar

Monatsansicht | Nächste Kalenderwoche | 01.01.2007 - 31.01.2007 | Schaub Peter

Auswahl anzeigen | 01 - Januar | 2007

Januar 2007

Montag	Dienstag	Mittwoch	Donnerstag	Freitag	Samstag	Sonntag
1.1. Neujahr	2.1. Urlaub	3.1. Urlaub	4.1. Urlaub	5.1. Urlaub	6.1.	7.1.
8.1. Informationsmaterial: Stutzer Jochen Abnahme Planung	9.1. 10:00-12:00 Personalgespräche	10.1. 13:00-17:00 Besprechung CONSULT in Hamburg	11.1. Informationsmaterial: Meier Hannah	12.1. Konzeptabnahme	13.1.	14.1.
15.1.	16.1. 09:00-12:00 Besprechung Vertriebsstrategie	17.1. Präsentation: Meier Hannah	18.1.	19.1.	20.1.	21.1.

TeamCalendar

Month view | Next calendar week | 07.12.2009 - 13.12.2009 | Conner Jane

Show selection | M12_December | 2009 | 9-19

Dezember 2009

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
7.12. Illness	8.12. 10:00 - 12:00 General call Prototype 4.5	9.12.	10.12. Meeting CONSULT GmbH Hamburg	11.12. Holiday	12.12.	13.12. third Advent
14.12.	15.12.	16.12. 09:00-12:00 conference marketing strategy	17.12.	18.12.	19.12.	20.12. fourth Advent
21.12.	22.12. 13:00 Presentation: Smith Alice	23.12.	24.12. Christmas Day	25.12. first Christmas Day	26.12. second Christmas Day	27.12.
28.12.	29.12.	30.12.	31.12.	1.1. New Year	2.1.	3.1.

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