



MANAGING QUEUES IN MICROSOFT DYNAMICS CRM 2011

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Contents

Introduction	3
An overview of Queues in Microsoft Dynamics CRM	3
How are Queues created in CRM	4
How are Queues made visible to users?	4
What can be put into a Queue?	4
What happens when I add something to a Queue?.....	5
How do I know something is in the Queue?	5
What can a user do with Queue Items?.....	6
Example.....	6
Conclusion:.....	7
Next steps:.....	7
Contact Details.....	7

Introduction

This e-book has been written for anyone involved in a Microsoft Dynamics CRM project or instance. It assumes you have good foundation knowledge of CRM activities and core entities such as Accounts and Contacts. It serves as an introduction to Queue technology in Dynamics CRM and helps explain where, when and how you might use Queues. It is important to note that every user has an individual Queue when CRM is first configured. All other Queues are optionally added. Further, Queues may be linked to email addresses to manage incoming and outgoing emails. Since Queues are a core part of CRM then we can also automate the routing of an item to Queues using Workflows and Dialog Processes.

An overview of Queues in Microsoft Dynamics CRM

A queue in Dynamics CRM is an entity that helps you effectively manage workload for teams of users. From a queue, users or teams can identify items (the term *item* is important) of work to select and choose to work on (again the terms are significant). Using such methods can ensure that key pieces of work are not missed and managers can identify who is working on which activity.

Q: How do I know if there are any queues in my instance of CRM?

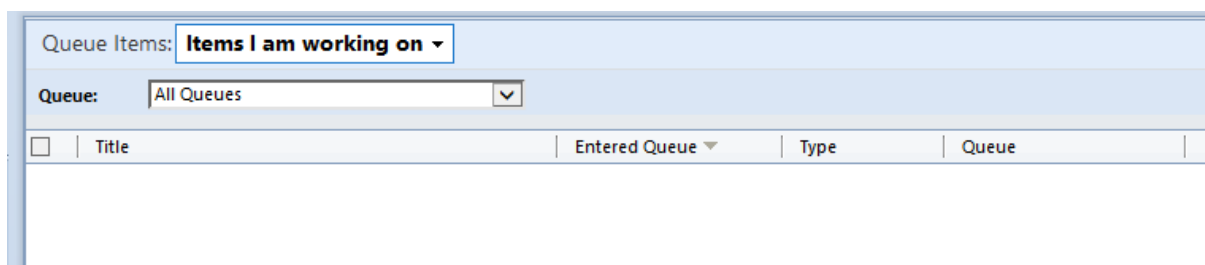
- Ensure you are logged into CRM via a browser or Outlook
- Click on Workplace, My Work and Queues.

TIP: This is an important place – bookmark it!

Otherwise contact your system administrator and ask.

Q: What will I see?

Without significant customisation, the window will show the following:



The view defaults to showing items that you are working on (more later) and a selector that has showing All Queues. It is important to note that the items in this view could be coming from many queues that the user is responsible for monitoring and managing.

TIP: Click the dropdown arrow on the Queue selector and you will see a list of all Queues that have been configured in CRM.

TIP: Change the Queue Items view (shown above as Items I am working on) to see other views including Items Available to work on. This may or may not show records.

How are Queues created in CRM

A user with the appropriate security role (see permissions required below) can add a queue when:

1. Creating a new user
2. Creating a new team
3. Creating a new queue

That user (typically a System Administrator) requires the following permissions

Read, Create, Write, Append, Append To, Delete.

TIP: They do not necessarily require the ability to assign a queue or share a queue.

How are Queues made visible to users?

Queues are linked to Business Units and based on a users security role the visibility of Queues are managed like any other CRM entity. However, remember that with Queues, users need to be able to read from the Queue but also need to be able to move things into and out of a Queue.

TIP: Typically a user will require the following permissions

Read (whats in my queue?) and Append To (put something in my queue)

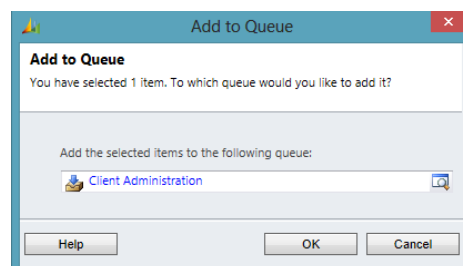
However, the level at which this is provided requires analysis. So, at a minimum a user would require the ability to Read and Append To their own individual Queue.

What can be put into a Queue?

The answer is pretty much everything, in terms of CRM entities. That means a user can put a Task in there (the thing we mostly think of when considering Queues) or an entity like an Opportunity. It depends on how the entities have been defined in CRM.

Can I add an entity to a Queue?

TIP: Go to the view for the entity. Check the ribbon or the form. If there is a button that shows

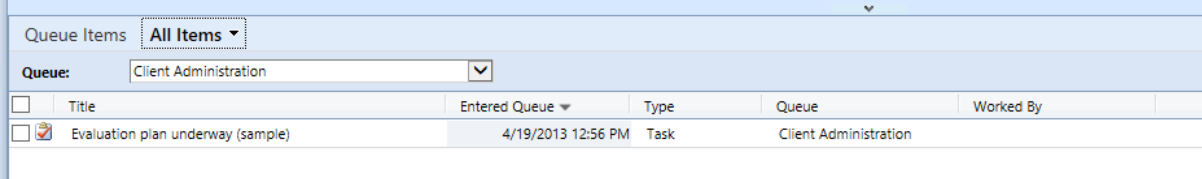


Then the entity supports the user adding that item to a Queue.

What happens when I add something to a Queue?

When a record is added to Queue, a pointer to that record is created and that pointer is called a Queue Item. This record is a generic record which can point to any record that may be added to a Queue. It is the Queue Item that users select and choose to work on. It is the Queue Item that tells us whether something is being worked on or not. This is important as we can report and perform Advanced Find queries on Queue Items and identify if someone is working on that item or not.

An example:



<input type="checkbox"/>	Title	Entered Queue	Type	Queue	Worked By
<input type="checkbox"/>	Evaluation plan underway (sample)	4/19/2013 12:56 PM	Task	Client Administration	

Here we can see that a Task has entered the Client Administration Queue and a Queue Item has been generated and no one is currently working on it (see Worked By column).

How do I know something is in the Queue?

CRM does not send any alerts to users when a Queue item is created. So, there are some options open to us

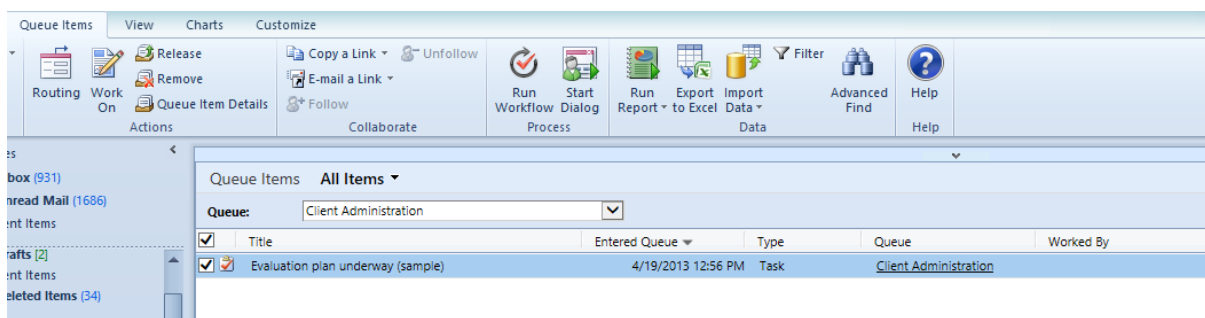
1. Detect the creation of a Queue Item and alert a key user or team
 - Options here include a CRM plug-in or a Process Workflow
2. Create a Dashboard component that displays the list of Queue Items in a specific Queue

Clearly, it is vital to train the end users about how to navigate to the queue, when that should be done and what options are open to them when they get there.

What can a user do with Queue Items?

When looking at the Queue workplace (see above), the user can:

1. Change the Queue Items view selector. Typically, the user will be switching between items that they are working on and items that are available to work on
2. Change the Queue that they are viewing. Users can select between all of the Queues that are available (all are visible) and individual user queues.
3. Select an item or items
4. Choose to Work On a Queue Item
5. Choose to Release and Item that they are working on
6. Route the Queue to another Queue (and optionally re-assign the owner)
7. Remove an Item from the Queue
8. Check the Queue Item details

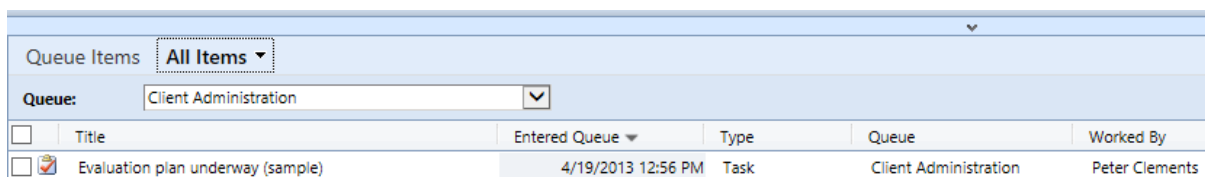


Example

In the example above, a sales person has moved a task to the Client Administration Queue so that Sales Support team can pick up and work on the Evaluation Plan

Peter, a member of the Sales Support Team, navigates to the Queue workplace, selects the Client Administration Team and the Items Available to Work On view.

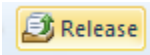
Peter identifies task and checking the details, clicks Work On. This moves the Queue Item into his Queue and disappears from the Items Available to Work from. This ensures that anyone else working on this queue does not pick up the task that Peter is now working on. For example, the All Items view shown below identified Peter as working on this Queue Item.



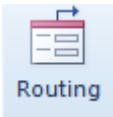
When Peter now selects and opens the Queue Item he will be taken to the Task. It is important to note that Peter hasn't become the owner of the Task just by selecting the Queue Item. Depending on security role he may be able to close the Task (using Mark Complete) or he may need to forward the item / task to someone else. One way to do this would be to re-assign the task but using Queues he should route the Queue Item to another user / team / queue by using the one of the following options from the Queue screen

1. Release (back to the Queue). Perhaps Peter's manager needs to add some comments to the Task
2. Route (to another Queue). Perhaps another Team needs to work on this Task following Peter's work on the Task.
3. Route directly to another user. Peter knows who now needs to work on this Task and will forward directly to that user's queue

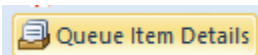
Having selected the Queue Item, Peter can perform these functions as follows:



clicking this icon from the ribbon allows Peter to pass the item back to the Queue



clicking this icon from the ribbon allows Peter to direct the item to another Queue



clicking this icon from the ribbon allows Peter to change the Worked By field to pass the item directly to another user. See graphic below:

 A screenshot of the "Queue Item" form in Microsoft Dynamics CRM 2011. The form title is "Evaluation plan underway (sample)". The "General" tab is selected. The form contains the following fields:

- Queue ***: Client Administration
- Queue Item ***: Evaluation plan underway (sample)
- Worked By**: Peter Clements
- Entered Queue**: 4/19/2013 12:56 PM
- Modified On**: 4/19/2013 3:20 PM

Peter can change the Worked By field to another user and so 'route' the task to another User.

Conclusion:

Microsoft Dynamics CRM 2011 provides clients with the ability to route and process work in a way that limits the risk of work items being missed or ignored. It also ensures that teams and their managers understand who is working on what. So, if an individual is perhaps off sick, it is relatively easy to re-allocate work via the Queue Items without changing the ownership of records.

Next steps:

If you would like advice and assistance on implementing Queues in your solution or project then email us at closethegap@crmknowledge.co.uk. Also, if you require further assistance with Microsoft Dynamics CRM 2011 features or functions then contact us to find out about our skills development and project mentoring offerings.

Contact Details

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