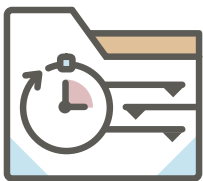


Project Management Add-ons for Dynamics 365 for Project Service Automation

User Guide



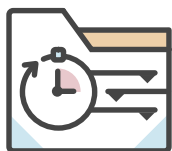
Project Management Add-ons
for Dynamics 365
Project Service Automation

proMX AG
Nordring 100
90409 Nuremberg
Germany

E-Mail: sales@proMX.net

Time Tracking for Dynamics 365 for Project Service Automation

Time Tracking for Dynamics 365 for Project Service Automation extends the time and expense tracking functionality of Dynamics 365 for Project Service Automation. It allows employees to track their work efforts and expenses for project tasks to which they have been assigned.

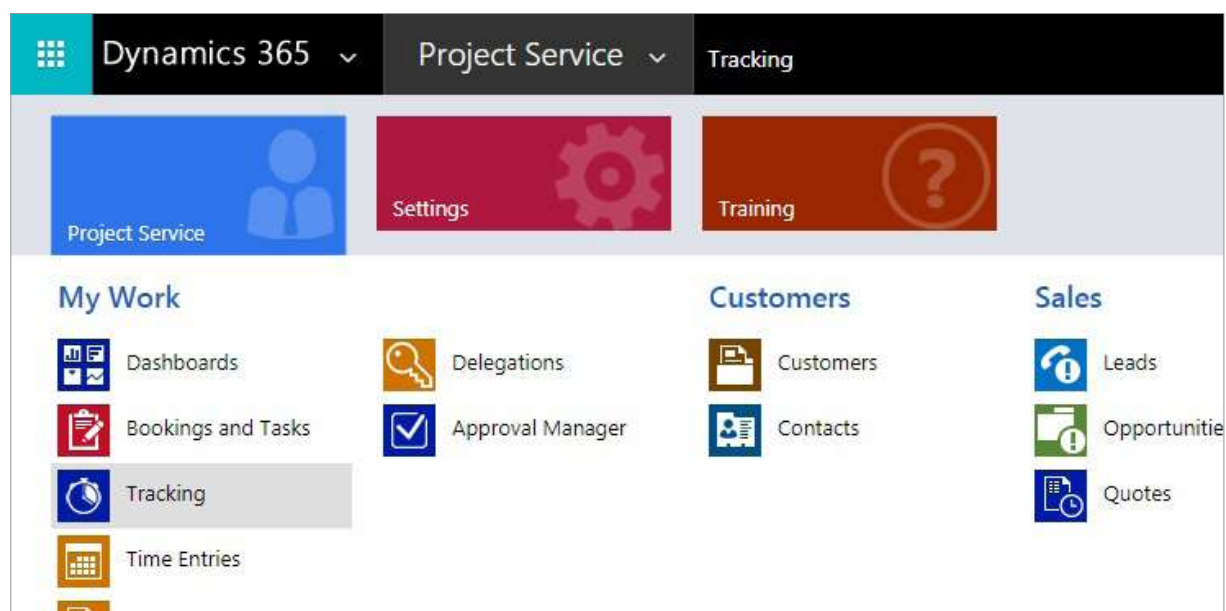


Manage Time Entries

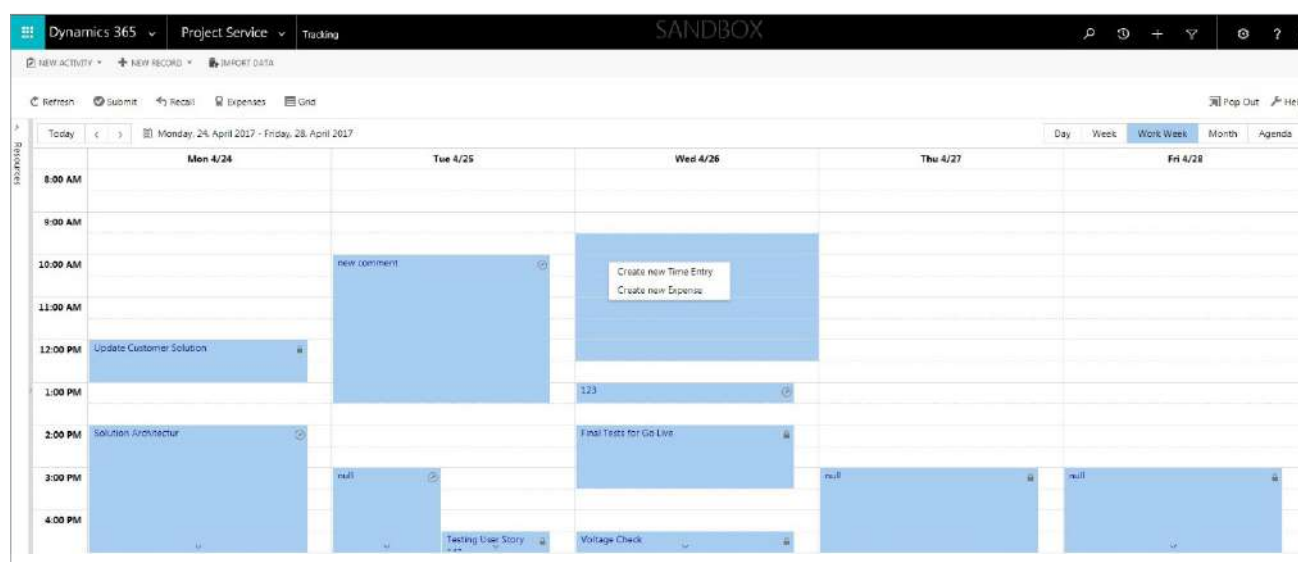
Each time entry requires a specific start and end time, its duration is calculated automatically and cannot be edited.

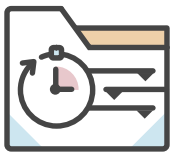
Create a Time Entry

1. Go to **Project Service > Tracking**.



2. Select the desired time frame in the calendar by clicking and holding the left mouse button. Then, right click to open the context menu and choose **Create new Time Entry**.





3. In the Time Entry creation form, select the relevant project task assignment in the project tree on the left-hand side. Then, type the required details in the form on the right. Create the time entry by clicking **Save**.

Time Entry

Expand Collapse Search

Name	Start Date	Due Date
Metropolitan Manufacturing		
Fitting and Commissioning on c...	4/18/2017	5/4/2017
Mechanical fitting	4/25/2017 12:00 AM	4/26/2017 11:58
Mechanical fitting	4/25/2017 12:00 AM	4/26/2017 11:58
John Adam	4/25/2017	4/26/2017
Electrical fitting	4/25/2017 12:00 AM	4/26/2017 11:58
Electrical fitting	4/25/2017 12:00 AM	4/26/2017 11:58
John Adam	4/25/2017	4/26/2017
MSG-Services		
CRM Workshop	4/24/2017	5/15/2017
Kick Off Meeting	4/24/2017 12:00 AM	4/26/2017 11:58

Internal Comments

Start Date 4/26/2017 9:30 AM

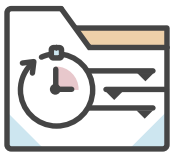
Due Date 4/26/2017 12:30 PM

External Comments

Type Work

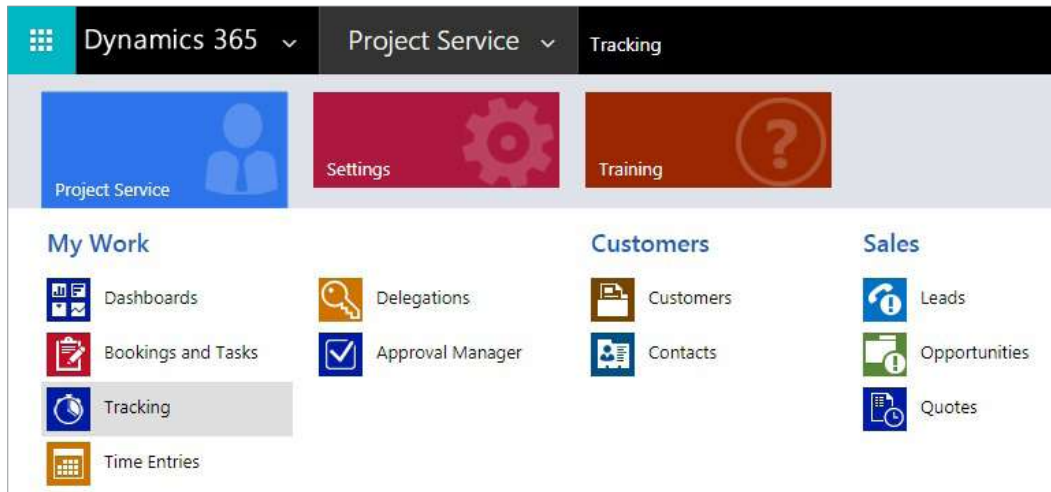
Role

Save Cancel

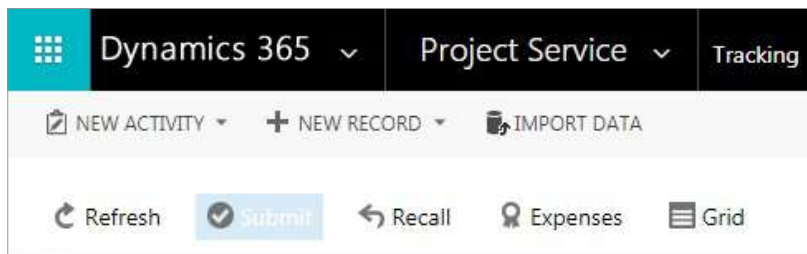


Submit a Time Entry

1. Go to **Project Service > Tracking**.



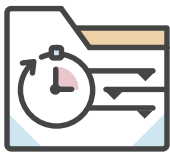
2. Click **Submit**.



3. Select the entry you wish to submit via click. You may select multiple entries at once by holding the CTRL key. Click **Submit** at the bottom right corner of the screen.

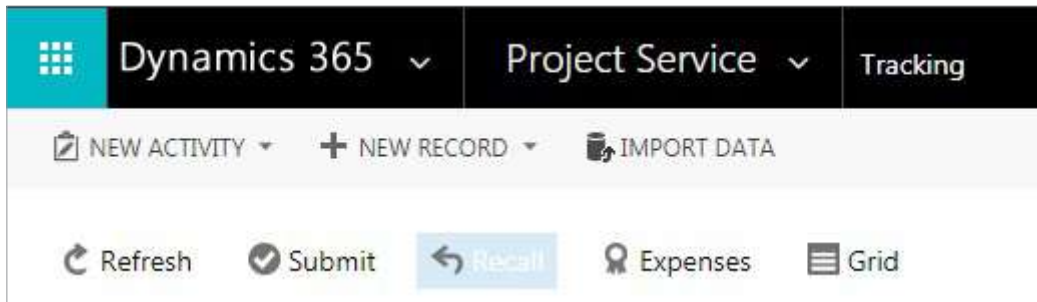
Submit Records						
Time Entry						
Start Date	Due Date	Duration	Type	Internal Comments	Project Task	Entry Status
4/25/2017	4/25/2017	4.5	Work		Kick Off Meeting	Returned
4/25/2017	4/25/2017	3.5	Work	new comment	Electrical fitting	Draft
4/24/2017	4/24/2017	6	Work	Solution Architectur	Architect	Returned
4/26/2017	4/26/2017	0.5	Work	123	Mechanical fitting	Draft
4/26/2017	4/26/2017	1.5	Work	Demo Tracking	Mechanical fitting	Draft

The status of the selected time entries will change from 'draft' to 'submitted'. These entries can no longer be edited (the status icon will change from a pen to a lock).



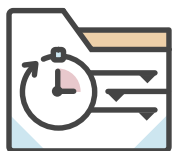
Recall a Time Entry

1. In case a time entry was submitted mistakenly or you want to edit a submitted time entry, you may recall it. To do so, click **Recall**.



2. Select one or multiple time entries you wish to recall and choose **Recall** at the bottom right corner of the dialog windows. The selected entries will return to the draft stage and may then be edited again.

Recall Records						
Time Entry						
Start Date	Due Date	Duration	Type	Internal Comments	Project Task	Entry Status
4/26/2017	4/26/2017	3	Work	Voltage Check	Electrical fitting	Submitted
4/26/2017	4/26/2017	1.5	Work	Final Tests for Go Live	Go live readiness assessment	Submitted

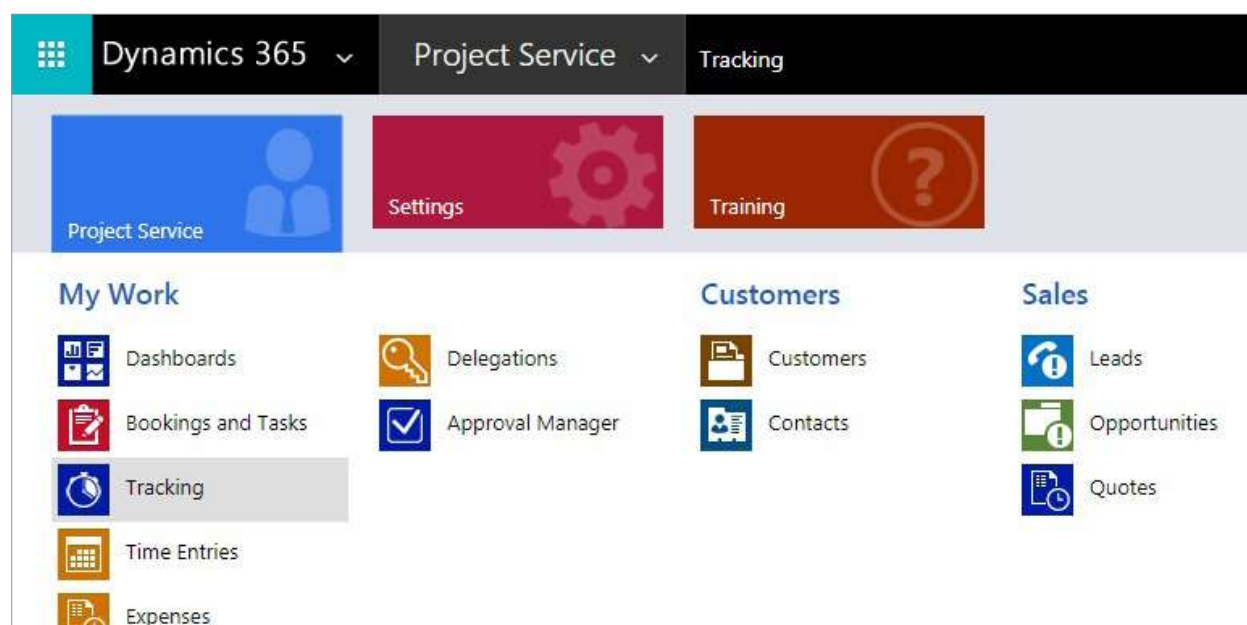


Expenses

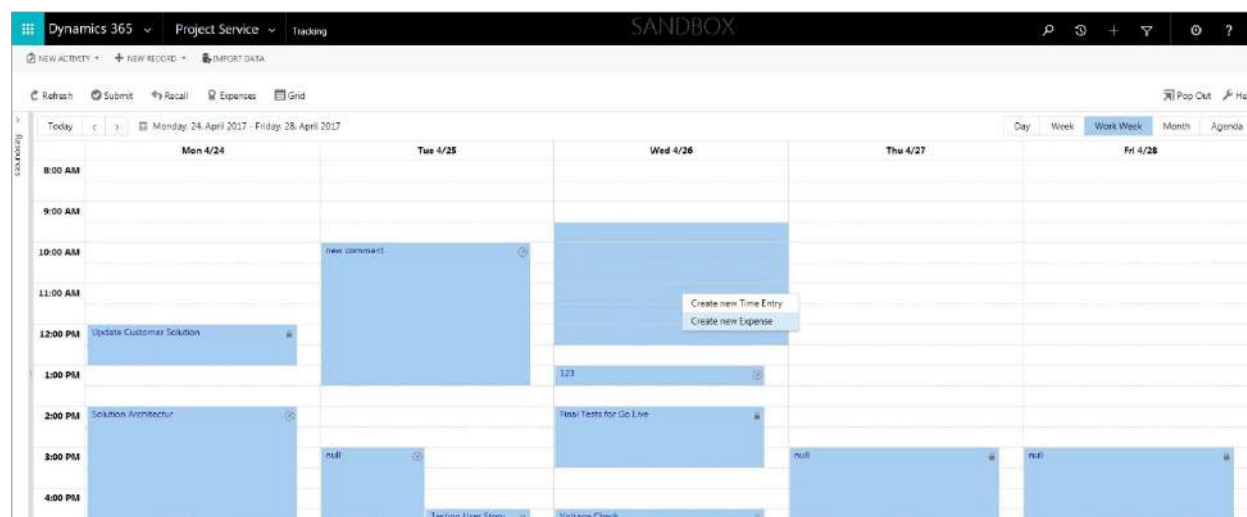
In addition to working time, you may also track project-related expenses. The following expense categories are available: Airfare, Car Rental, Hotel, Meal, Miscellaneous, Public Transportation and Taxi.

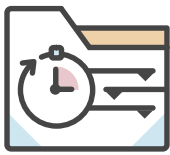
Create an Expense

1. Go to **Project Service > Tracking**.



2. Select the desired time frame in the calendar by clicking and holding the left mouse button. Then, right click to open the context menu and choose **Create new Expense**.





3. In the Expense creation form, select the relevant project task assignment in the project tree on the left-hand side. Then, type the required details into the form on the right. Create the expense by clicking **Save**.

The screenshot shows the 'Expense' form in Dynamics 365. On the left, there is a project tree with a table of project tasks. The table has columns for Name, Start Date, and Due Date. The tasks are:

Name	Start Date	Due Date
Metropolitan Manufacturing		
Fitting and Commissioning on c...	4/18/2017	5/4/2017
John Adam	4/21/2017	4/24/2017
MSG-Services		
CRM Workshop	4/24/2017	5/15/2017
John Adam	4/24/2017	4/26/2017

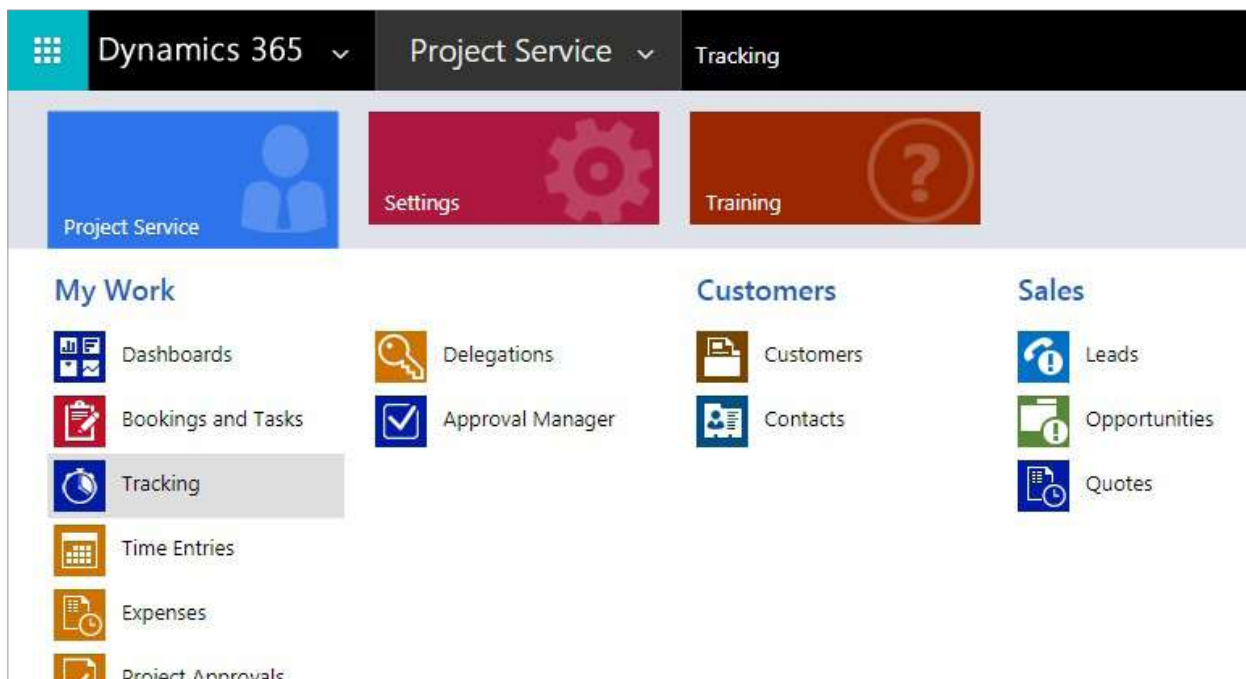
On the right, there are input fields for:

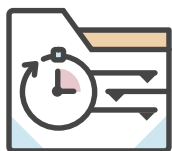
- Expense Purpose:
- Transaction Date: 4/26/2017 (with a calendar icon)
- Amount: 0.00 (with up/down arrows)
- External Comments:
- Expense Category: Airfare (dropdown menu)

At the bottom right, there are 'Save' and 'Cancel' buttons.

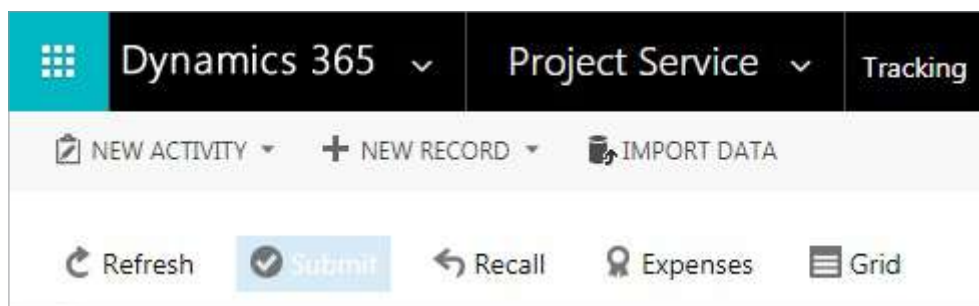
Submit an Expense

1. Go to **Project Service > Tracking**.

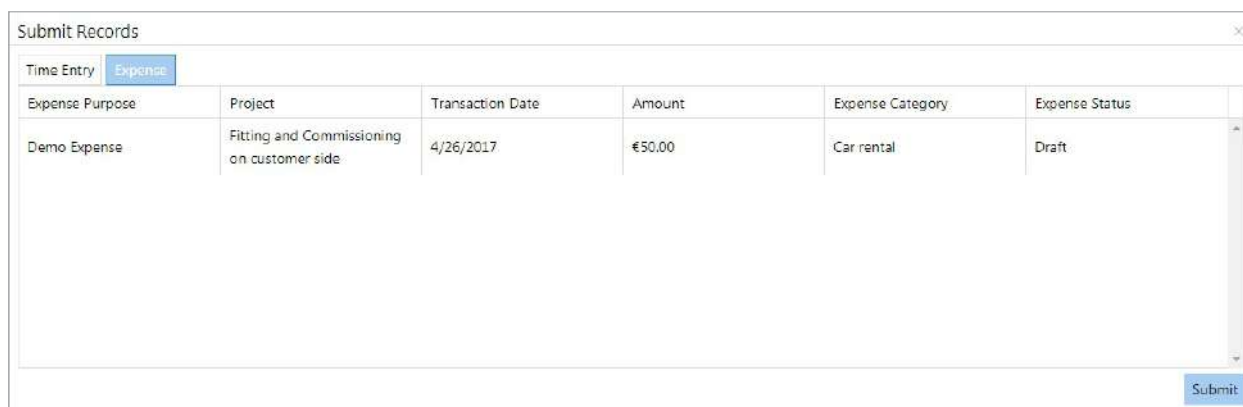




2. Click **Submit**.



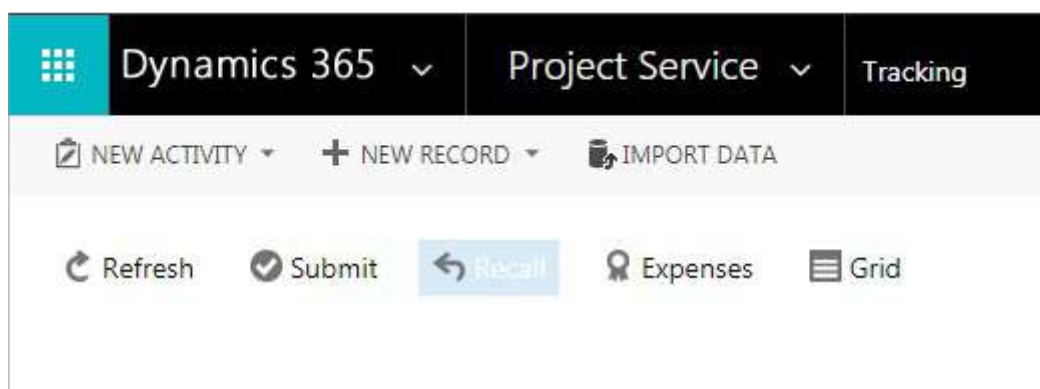
3. Switch to the **Expense** tab. In the list of draft expenses, select those you wish to submit via click. You may select multiple expenses at once by holding the CTRL key. Click **Submit** at the bottom right corner.

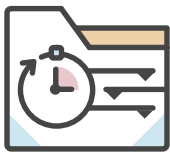


The status of the selected expenses will change from 'draft' to 'submitted'. These entries can no longer be edited (the status icon will change from a pen to a lock).

Recall an Expense

1. In case an expense was submitted mistakenly or a submitted expense needs to be edited, you may recall it. To do so, click **Recall**.





Project Management Add-ons

for Dynamics 365
Project Service Automation

10
page

2. Select one or multiple time entries you wish to recall and choose **Recall** at the bottom right corner of the dialog windows. The selected entries will return to the draft stage and may then be edited again.

Recall Records

Time Entry

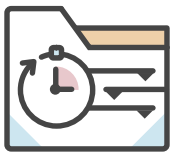
Expense

Expense Purpose	Project	Transaction Date	Amount	Expense Category	Expense Status
Demo Expense	Fitting and Commissioning on customer side	4/26/2017	€50.00	Car rental	Submitted

Recall

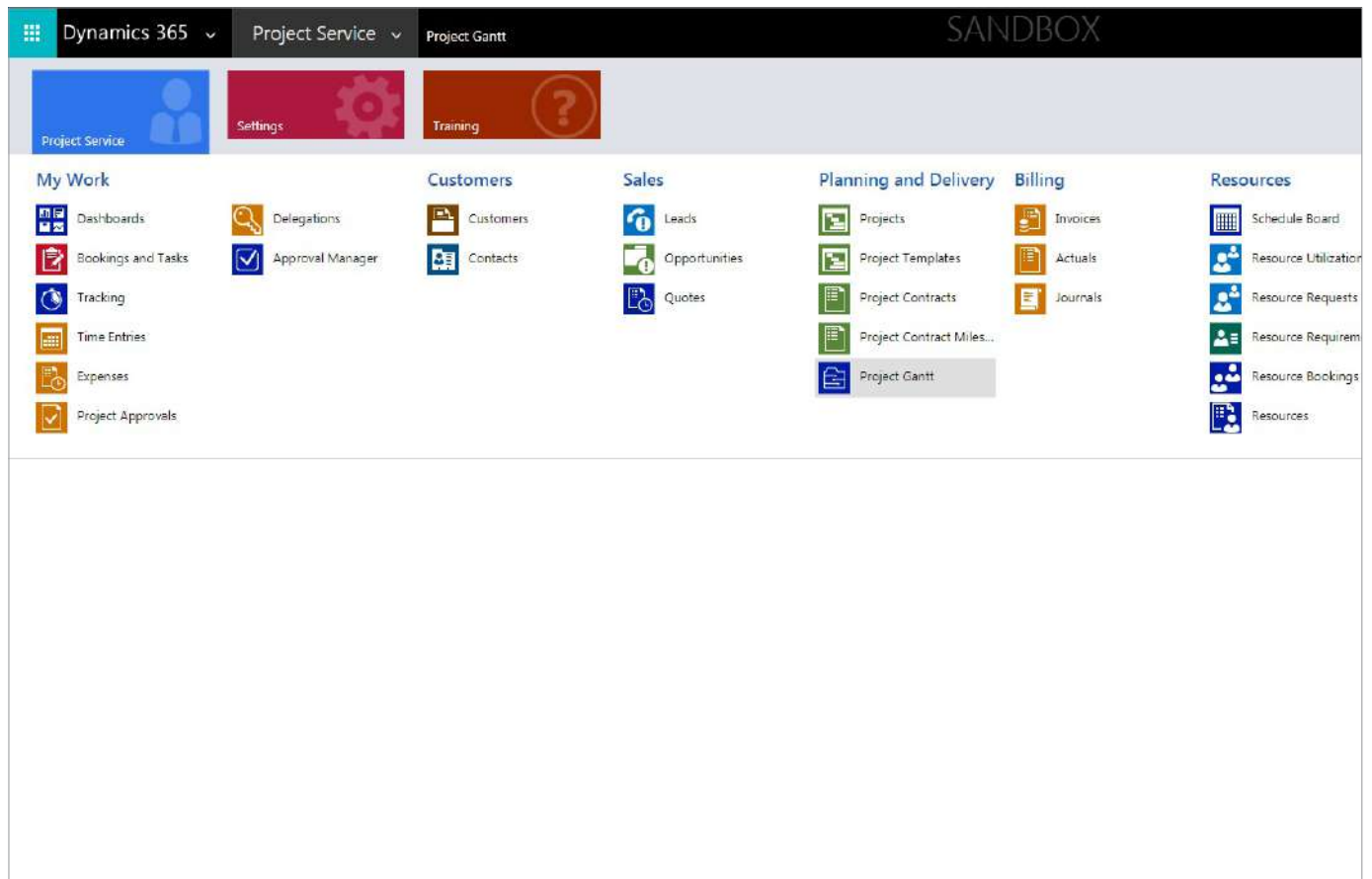
Project Gantt for Dynamics 365 for Project Service Automation

Project Gantt for Dynamics 365 for Project Service Automation is an add-on which extends the Dynamics 365 for Project Service Automation app. It allows project managers to plan and control project structures and progress. Project Gantt supports all Dynamics 365 for Project Service Automation entities.

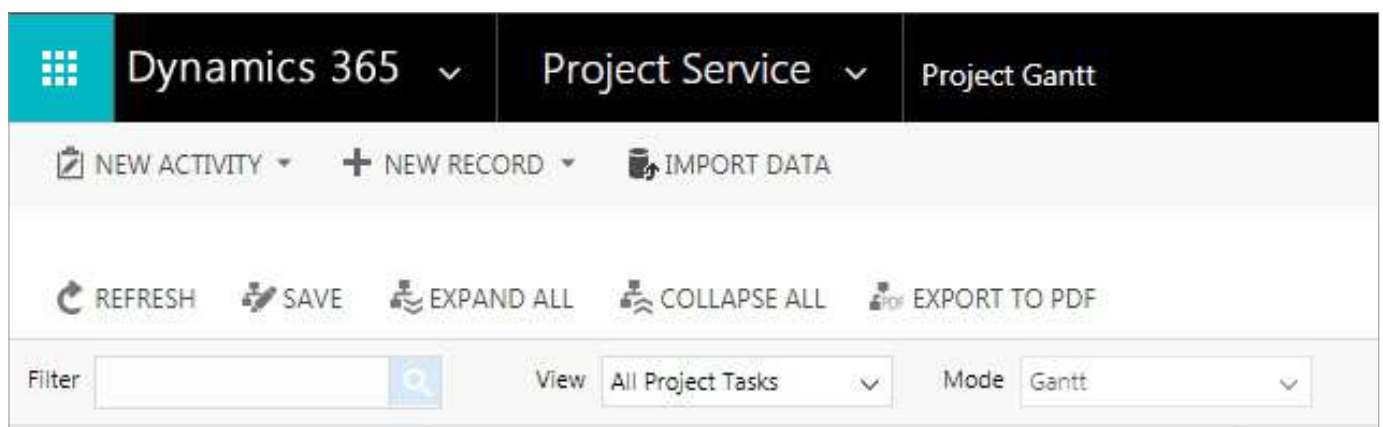


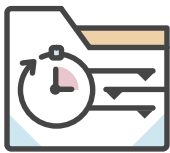
Display projects

1. Go to **Project Service > Project Gantt**.



2. To display all projects, click **Refresh**. To select particular projects to display, click the magnifying glass icon in the field **Filter**.





3. Browse Projects, Accounts, Contacts, and Project Tasks and **Select** the records you would like to display. Then, click **Add**.

Look Up Records

Look for

Account

Look in

My Active Accounts

Search

✓ Account Name	Main Phone	Address 1: City
1. FC Nürnberg		Nuremberg
Bilfinger EMS		
Boehringer Ingelheim Pharma GmbH & Co. KG	+49 6132 77 0	Ingelheim
Coho Diagnostic	425-821-4885	Bothell
Datev eG		Nürnberg
Edinburgh Health Services	425-825-7700	Bothell

1 - 23 (0 selected)Page 1

Select

Remove

Selected records: (0)

Invert selection

Add

Cancel

4. Click **Refresh**.

Dynamics 365

Project Service

Project Gantt

NEW ACTIVITY

NEW RECORD

IMPORT DATA

REFRESH

SAVE

EXPAND ALL

COLLAPSE ALL

EXPORT TO PDF

Filter

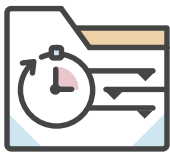
Livetube KG; LUZ AG; proh

View

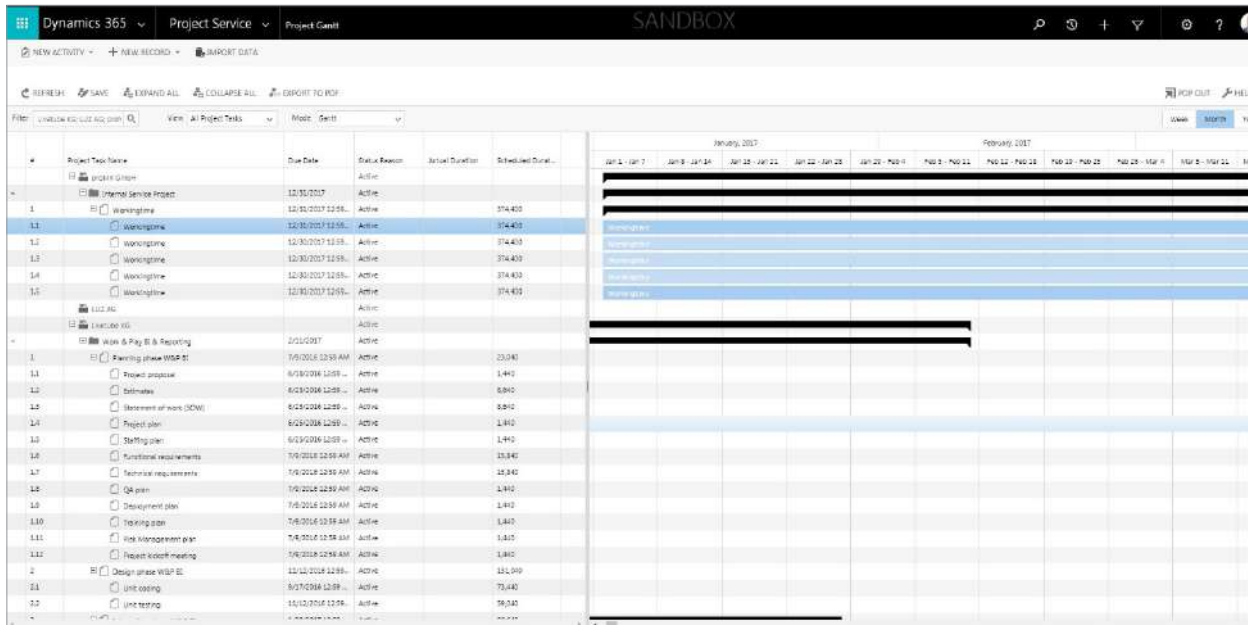
All Project Tasks

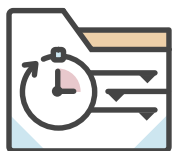
Mode

Gantt



The selected records will appear in the project tree hierarchy on the left and as Gantt charts on the right.





Add a new project

1. Select the account for which you wish to create a new project.
Right-click and select **Add new project**.

The screenshot shows the Dynamics 365 Project Service interface in Gantt view. The top navigation bar includes 'Dynamics 365', 'Project Service', and 'Project Gantt'. Below the navigation bar are buttons for 'NEW ACTIVITY', 'NEW RECORD', and 'IMPORT DATA'. A toolbar contains 'REFRESH', 'SAVE', 'EXPAND ALL', 'COLLAPSE ALL', and 'EXPORT TO PDF'. A filter bar shows 'Livetube KG; LUZ AG; pro...' and a 'View' dropdown set to 'All Project Tasks'. The main table has columns: '#', 'Project Task Name', 'Due Date', 'Status Reason', 'Actual Duration', and 'Scheduled Durat...'. The table contains three rows, all with 'Active' status. A right-click context menu is open over the second row, showing 'Open in CRM' and 'Add new project' options.

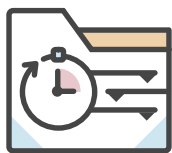
#	Project Task Name	Due Date	Status Reason	Actual Duration	Scheduled Durat...
	proMX GmbH		Active		
	LUZ AG		Active		
	LUZ AG		Active		

2. Fill in the form. Choose **OK** to schedule your project for creation. To create the project, subsequently click **Save** in the command bar.

The 'Create project' dialog box is shown. It has a title bar with a close button. The form contains the following fields:

- Name: New project
- Start Date: 7/13/2017
- Estimated Finish Date: 7/13/2017
- Customer: LUZ AG
- Project Manager: (empty)
- Estimated Hours: (empty)

At the bottom right, there are 'OK' and 'Cancel' buttons.



Manage project tasks

1. To create a new project task, select a project and right click to open the context menu. Select **Add child task**.

Dynamics 365 Project Service Project Gantt						
NEW ACTIVITY + NEW RECORD IMPORT DATA						
REFRESH SAVE EXPAND ALL COLLAPSE ALL EXPORT TO PDF						
Filter Livetube KG; LUZ AG; proh View All Project Tasks Mode Gantt						
#	Project Task Name	Due Date	Status Reason	Actual Duration	Scheduled Durat...	
	proMX GmbH		Active			
	Internal Service Project	12/31/2017	Active			
1	Workingtime	12/31/2017 12:59...	Active		374,400	
1.1	Workingtime	12/31/2017 12:59...	Active		374,400	
1.2	Workingtime	12/30/2017 12:59...	Active		374,400	
1.3	Workingtime	12/30/2017 12:59...	Active		374,400	
1.4	Workingtime	12/30/2017 12:59...	Active		374,400	
1.5	Workingtime	12/30/2017 12:59...	Active		374,400	

2. In the dialog window, fill in all fields and click **OK**.

Create task

☐ Is Milestone

Project Task NameTask

Start Date1/2/2017

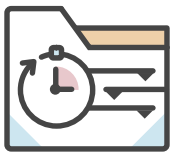
Due Date12/31/2017

Role

ParentInternal Service Project

Estimated Effort10,400.00

OKCancel

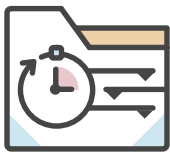


3. To assign a resource to a task, select the project task and right click to open the context menu. Select **Resources**.

The screenshot displays the Project Management Add-ons interface. On the left, a list of project tasks is shown with columns for ID, Project Task Name, Due Date, Status, Reason, Actual Duration, and Scheduled Duration. The task 'QA risk assessment' (ID 32) is selected. On the right, a Gantt chart shows the task's duration from October 28 to November 1, 2016. A context menu is open over the task, showing options: 'Open in CRM', 'Roll', 'Set Status Reason', 'Project Task', 'Resources', and 'Delete'. The 'Resources' option is highlighted.

4. Choose **New**.

The screenshot shows the 'Manage resources' dialog box. The 'Task' field is set to 'QA risk assessment'. Below it, there are two columns: 'Bookable Resource' and 'Hours'. The 'Bookable Resource' column is empty, and the 'Hours' column is also empty. At the bottom of the dialog, there are five buttons: 'New', 'Edit', 'Delete', 'Restore', and 'Close'. The 'New' button is highlighted.



5. To find the desired resource, click the magnifying glass icon in the **Bookable Resource** field.

The 'Assign resource' dialog box contains the following fields:

- Task:** QA risk assessment
- Bookable Resource:** (Empty field with a magnifying glass icon to its right)
- Hours:** 20
- From Date:** 11/11/2016
- To Date:** 11/19/2016

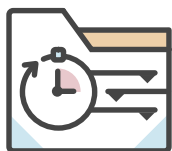
Buttons at the bottom: OK, Cancel

6. Select one or more resources and click **Select** and then **Add**.

The 'Look Up Records' dialog box shows a search for 'Bookable Resource' in 'Active Bookable Resources'. The search results table is as follows:

Name	Resource Type	Organizational
Efrain Schreiner	Contact	Seattle
Erika Meyer	User	PLX GER
Eva Dawson	Contact	Professiona
Florine Wilkerson	Contact	Professiona
Frankie Mundy	Contact	Discrete M

Below the table, it shows '1 - 25 (0 selected)' and 'Page 1'. There are 'Select' and 'Remove' buttons on the left, and an 'Add' button at the bottom right. A 'Selected records: (0)' section is also present.

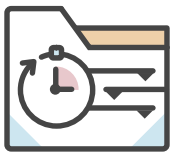


7. In the Assign resource window, click **OK**.

Click **Close**. Then, click **Save** in the top menu ribbon to finalize the assignment(s).



Integration testing	
QA risk assessment	Erika Meyer
Training manual	

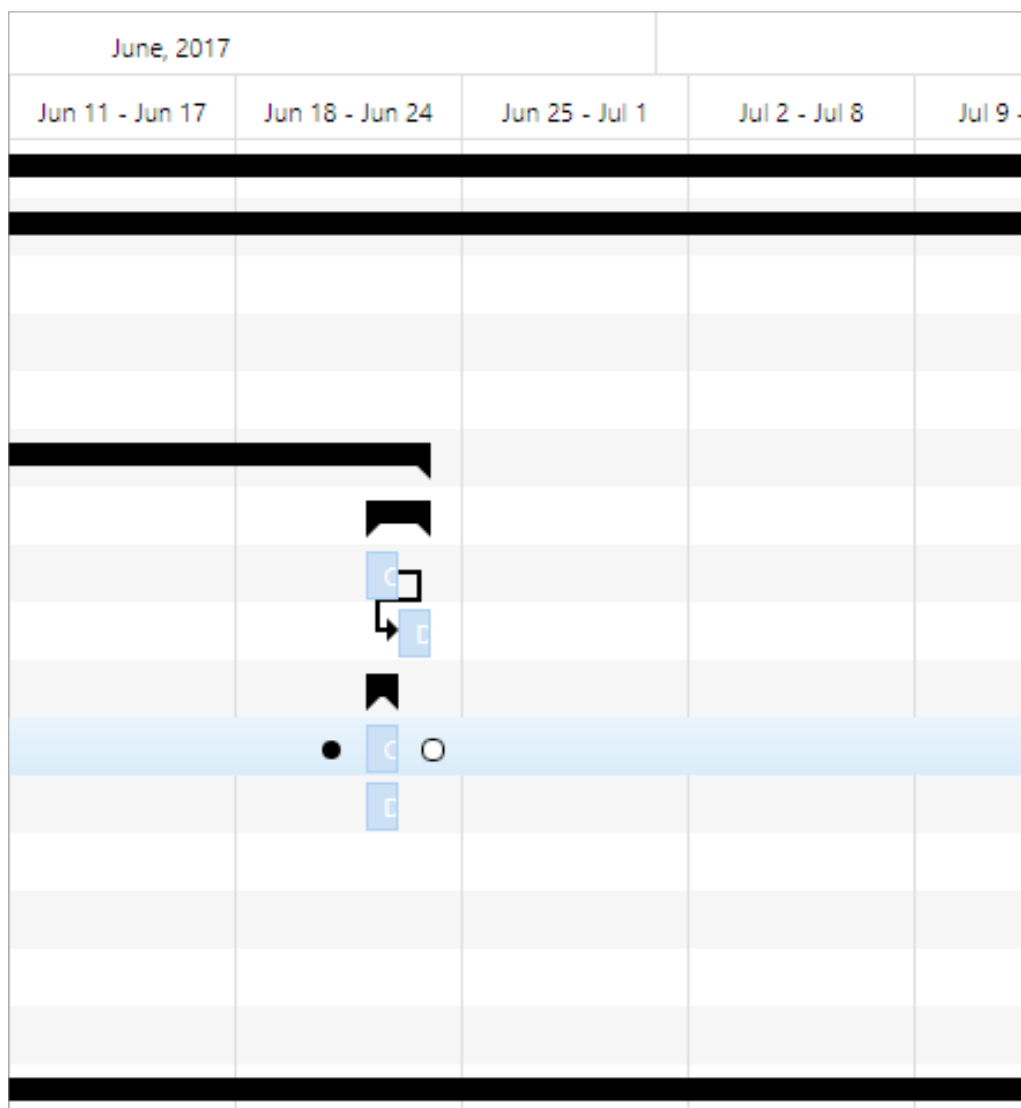


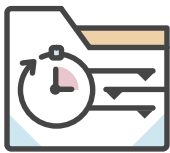
Create a project task dependency

There are four possible dependencies between project tasks: Finish-to-Start (FS), Finish-to-Finish (FF), Start-to-Start (SS), and Start-to-Finish (SF).

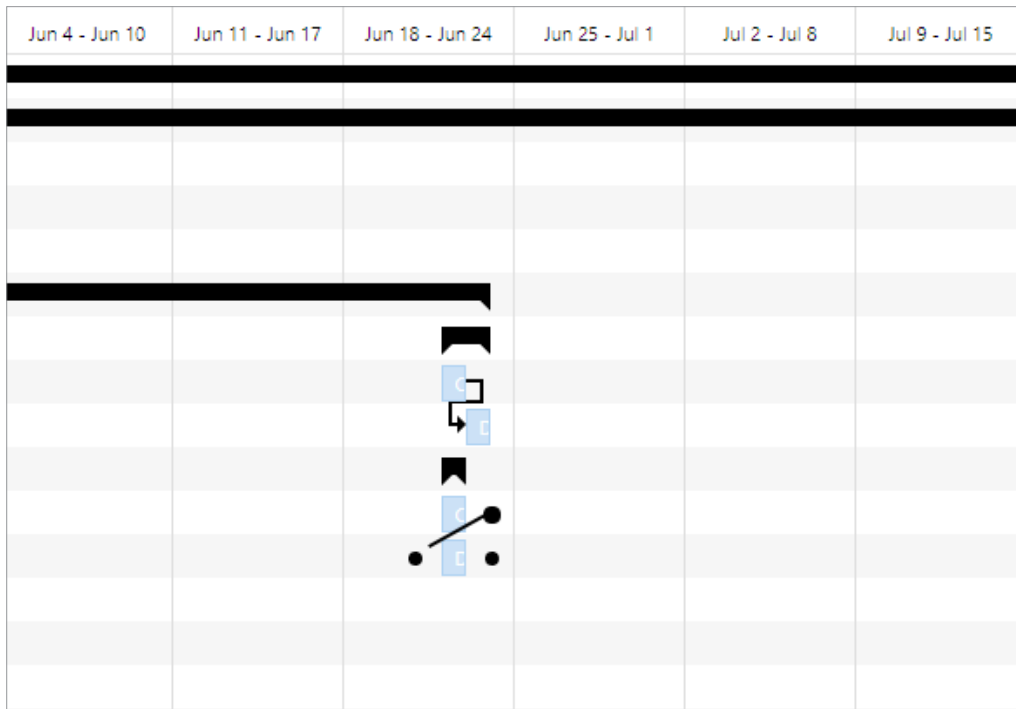
1. To create a dependency between two project tasks, navigate to the Gantt chart on the right-hand side of the screen.

Place your cursor on one of the project tasks. Two circles appear, the circle to the left of the chart represents the start of the project task, the circle on the right the end.

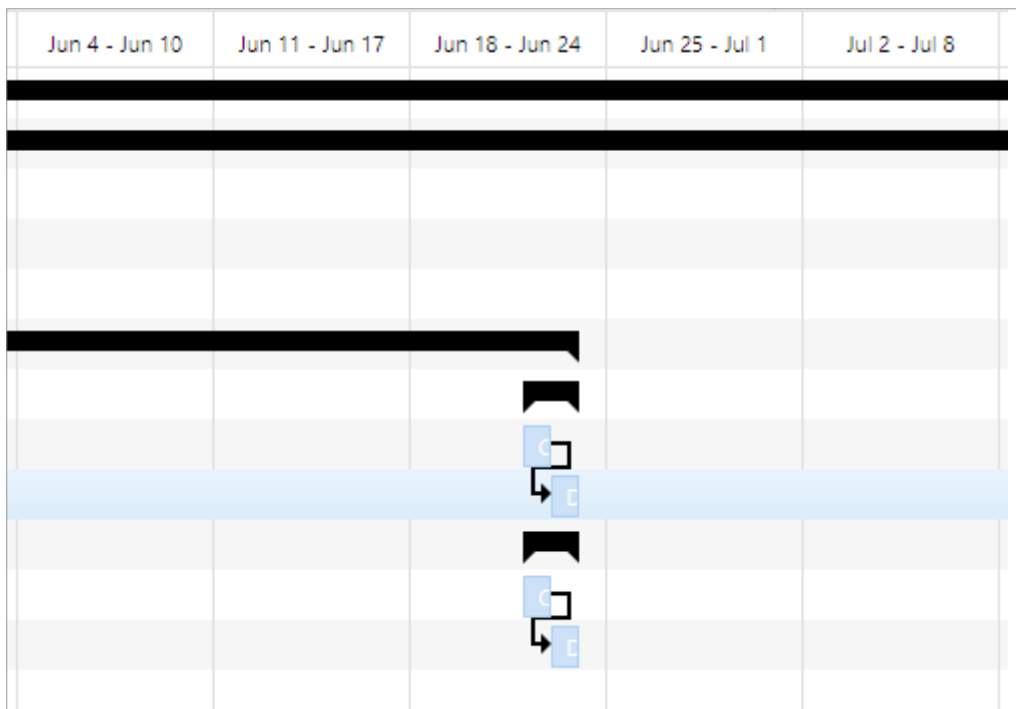




Click one of the circles, hold the mouse button and drag towards one of the circles of the second project task.



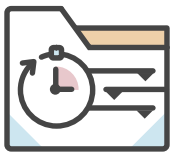
The resulting dependency will be depicted as an arrow.



2. Finalize the dependency by clicking **Save** in the command bar.

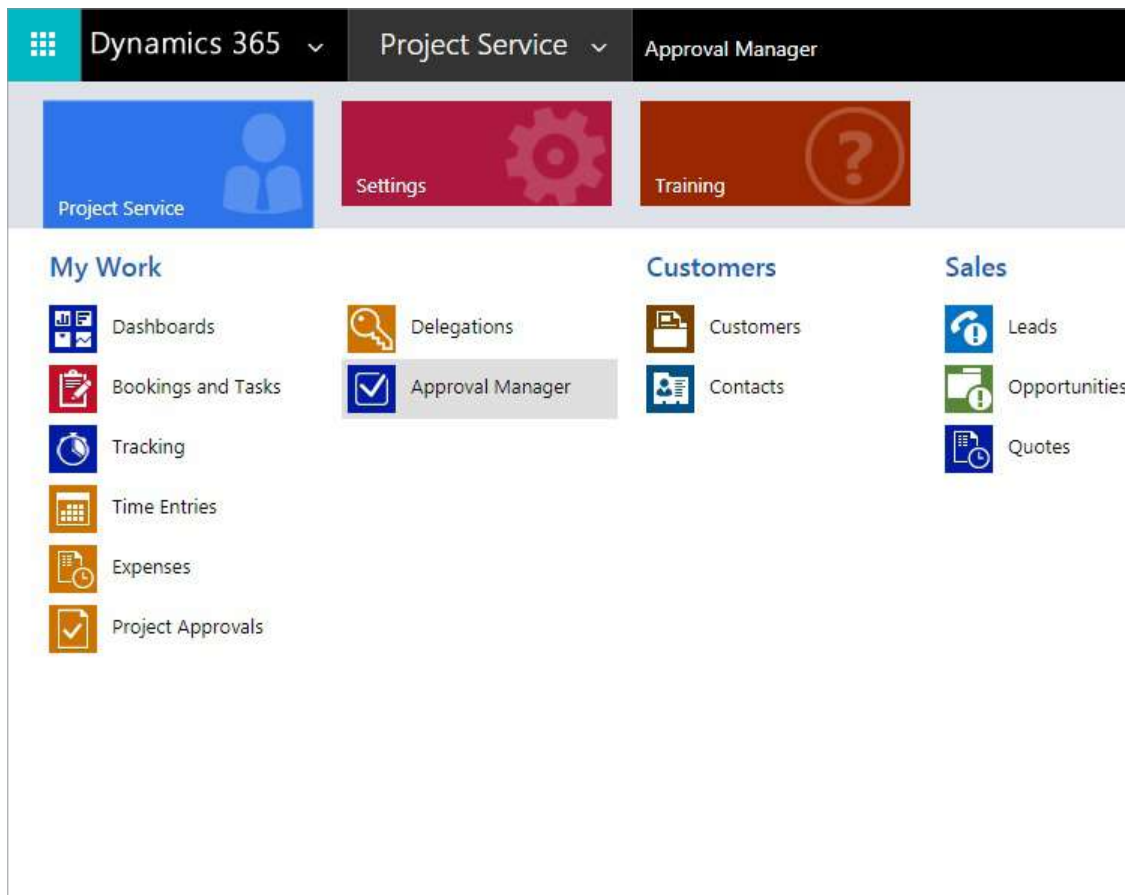
Approval Manager for Dynamics 365 for Project Service Automation

Approval Manager for Dynamics 365 for Project Service Automation extends the approval management functionality of Dynamics 365 for Project Service Automation. It allows project managers to check submitted time entries and expenses for accuracy, edit them if necessary, reject, or approve them. Approved time entries and expenses can then be used for invoicing.



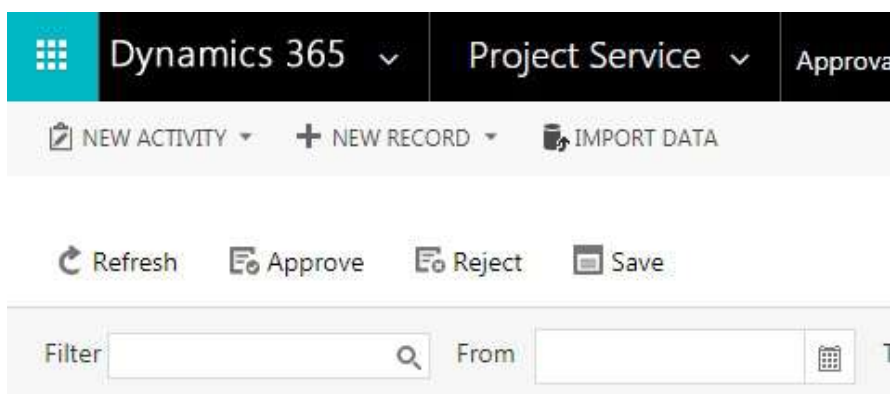
Approve or Reject Time Entries

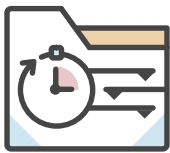
1. Go to **Project Service > Approval Manager**.



2. To display all time entries in the system, click **Refresh**.

To load only selected time entries, open the **Filter** look-up field by clicking the magnifying glass icon in that field. Then, add one or more projects, accounts, contacts, project tasks, bookable resources, or project task assignments, click **Select**, and finally **Add**.





Look Up Records

Look forProject

Look inMy Active Projects

Search

Name	Stage Name	Customer	Start Date	Estimate
CRM Default Implementation	Quote	MSG-Services	4/20/2017	
CRM Workshop	Plan	MSG-Services	4/24/2017	
Development Work	Quote	MSG-Services	5/1/2017	
E Risk Management Plan	Plan	Novartis AG	6/30/2017	
Einführung neues Medikament Deliver		Tennison AG	6/28/2017	
Planning and Communication Deliver		Motorola Mobility	6/18/2017	

1 - 19 (0 selected)Page 1

Select

Remove

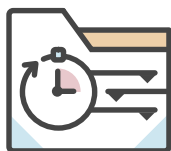
Selected records: (0)Invert selection

Add

Cancel

3. Click **Refresh**. Based on the selected view, date range and filter, records will be displayed in the main panel.

Time Entries		Expenses				
Date	Project	Project Task	Role	Type	Entry Status	
2/14/2017	Tech Parts Shop Fl...	Unit testing	Team Member	Work	Draft	
2/21/2017	Projekt Service Aut...	Kick Off Meeting	Project Manager	Work	Approved	
3/6/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved	
3/6/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved	
3/7/2017	Projekt Service Aut...	Documentation	Project Manager	Work	Approved	
3/7/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved	
3/8/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved	
3/9/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved	
3/9/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved	
3/10/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved	
3/10/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved	
3/10/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved	
3/13/2017	Tech Parts Shop Fl...	Unit testing	Team Member	Work	Approved	
3/13/2017	Tech Parts Shop Fl...	Training manual	Team Member	Work	Approved	



4. Use the project tree on the left-hand side to filter time entries by project, project task or project task assignment. To do so, expand the project tree and select the desired item in the structure.

Time Entries

Expenses

<

Project tree

Active Transport Inc.

Invoicing

TestProjekt -Project

Go Live

Schulung

Entwicklung

Bereitstellung

Kick Off Meeting

Analyse der Anforderungen

Default Project Service Automation Implementation- Templat

Alpine Ski Shop

MSG-Services

Montage und Inbetriebnahme - Template

Default Fitting and Commissioning Project - Template

Metropolitan Manufacturing

Rally Master Company Inc

Satin Finish Company

Demand Distributors

Manufaktur und Fertigungsbaul Müller

✓

Date

Project

Project Task

Role

Type

Entry Status

2/14/2017

Tech Parts Shop F...

Unit testing

Team Member

Work

Draft

2/21/2017

Project Service Aut...

Kick Off Meeting

Project Manager

Work

Approved

3/6/2017

Project Service Aut...

Development

Project Manager

Work

Approved

3/6/2017

Project Service Aut...

Development

Project Manager

Work

Approved

3/7/2017

Project Service Aut...

Documentation

Project Manager

Work

Approved

3/7/2017

Project Service Aut...

Development

Project Manager

Work

Approved

3/8/2017

Project Service Aut...

Requirements Wor...

Project Manager

Work

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3/9/2017

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3/10/2017

Project Service Aut...

Development

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Development

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Project Service Aut...

Requirements Wor...

Project Manager

Work

Approved

3/13/2017

Tech Parts Shop F...

Unit testing

Team Member

Work

Approved

3/13/2017

Tech Parts Shop F...

Training manual

Team Member

Work

Approved

3/13/2017

Project Service Aut...

Documentation

Project Manager

Work

Approved

3/14/2017

Tech Parts Shop F...

System training

Team Member

Work

Approved

3/14/2017

Tech Parts Shop F...

Unit testing

Team Member

Work

Approved

5. To approve a time entry, select it by clicking the check column. You may select multiple records at once. Once you have selected all desired records, click **Approve**.

Dynamics 365

Project Service

Approval Manager

NEW ACTIVITY

NEW RECORD

IMPORT DATA

Refresh

Approve

Reject

Save

Filter

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From

To

View

Time Entries

Expenses

< Project

Date

Project

Project Task

Role

Type

Entry Status

6/7/2017IT-Governancec developmentArchitectWorkSubmitted

4/26/2017Fitting and Commi...Electrical fittingProject ManagerWorkSubmitted

4/26/2017Fitting and Commi...Mechanical fittingProject ManagerWorkDraft

4/25/2017Tech Parts Shop FL...Unit testingTeam MemberWorkApproved

4/25/2017Fitting and Commi...Electrical fittingProject ManagerWorkDraft

4/24/2017Tech Parts Shop FL...Training manualTeam MemberWorkApproved

6. In case a time entry was approved by mistake or should be edited by the respective employee, you may unapprove these records by selecting them and clicking **Reject**.

Contact

For questions, wishes or feedback, please contact us via support@proMX.net or the below details.

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