

Approval Manager for Dynamics 365 for Project Service Automation

User Guide



Approval Manager

for Dynamics 365
Project Service Automation

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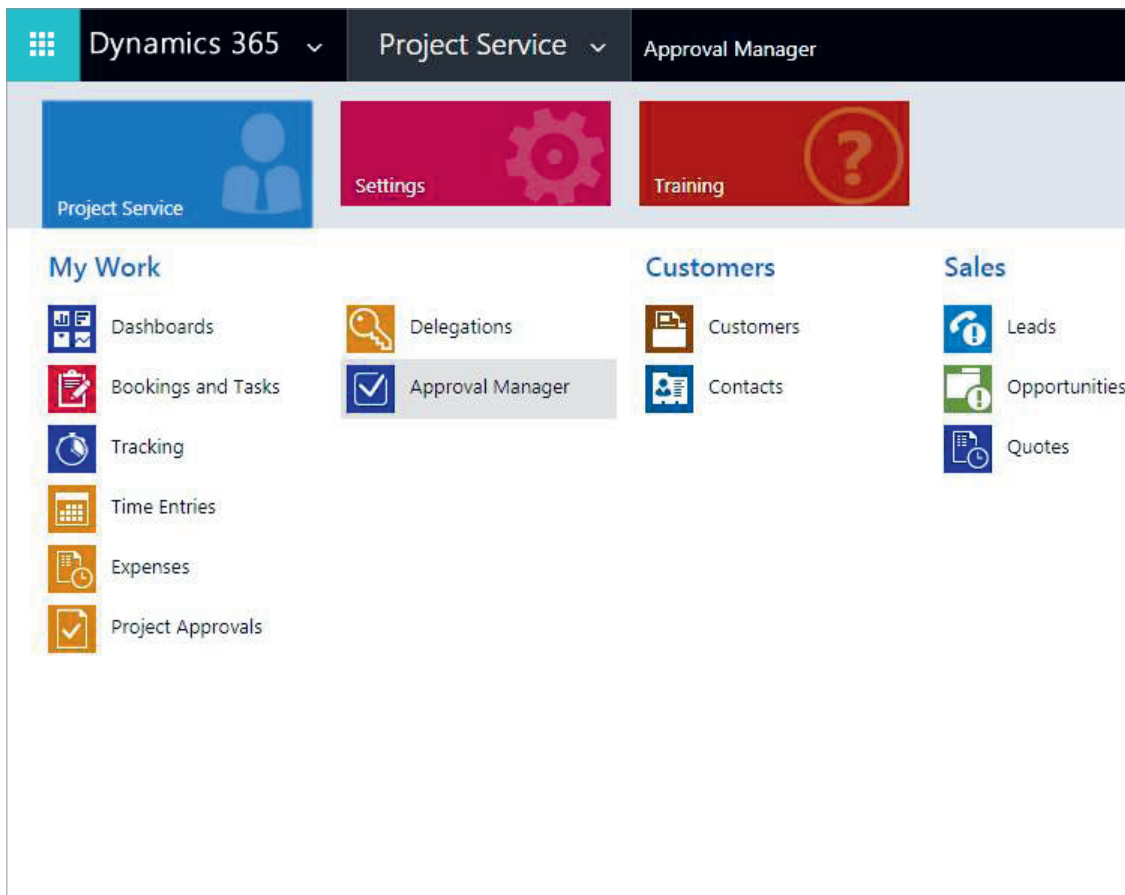
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Approval Manager for Dynamics 365 for Project Service Automation

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.

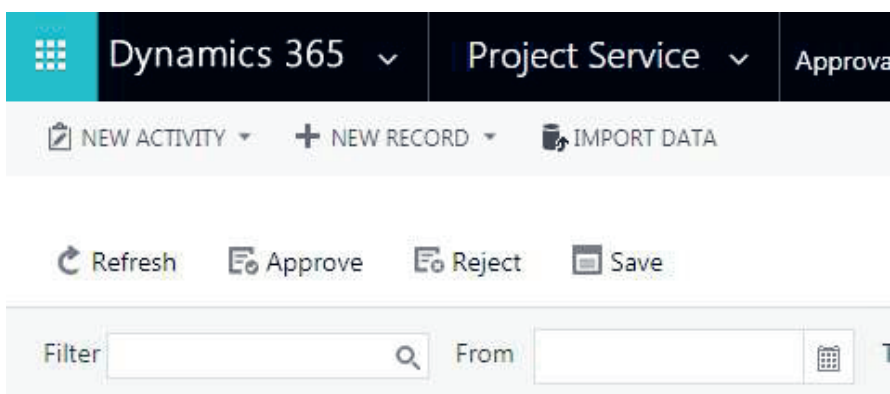
Approve or Reject Time Entries

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 for

Project

Look in

My 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	
	Financing and Capital Structure	Deliver	McAfee/Mcafee Mcafee	6/16/2017	

1 - 19 (0 selected)

Page 1

Selected records: (0)

Invert selection

Select

Remove

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
< Project	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



Approval Manager

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page

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 Fertigungsbaue 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

Approved

3/9/2017

Project Service Aut...

Requirements Wor...

Project Manager

Work

Approved

3/9/2017

Project Service Aut...

Requirements Wor...

Project Manager

Work

Approved

3/10/2017

Project Service Aut...

Development

Project Manager

Work

Approved

3/10/2017

Project Service Aut...

Development

Project Manager

Work

Approved

3/10/2017

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

From

To

View

Time Entries

Expenses

< Project

Date

6/7/2017

IT-Governance

c development

Architect

Work

Submitted

4/26/2017

Fitting and Commi...

Electrical fitting

Project Manager

Work

Submitted

4/26/2017

Fitting and Commi...

Mechanical fitting

Project Manager

Work

Draft

4/25/2017

Tech Parts Shop Fl...

Unit testing

Team Member

Work

Approved

4/25/2017

Fitting and Commi...

Electrical fitting

Project Manager

Work

Draft

4/24/2017

Tech Parts Shop Fl...

Training manual

Team Member

Work

Approved

4/18/2017

Fitting and Commi...

Planning Phase

Project Manager

Work

Draft

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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