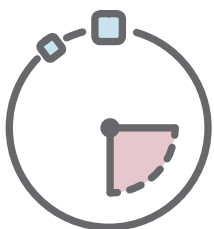


Time Tracking for Dynamics 365 Project Service Automation

User Guide



Time Tracking

for Dynamics 365
Project Service Automation

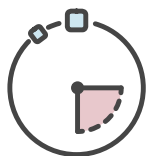
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90409 Nuremberg
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Time Tracking for Dynamics 365 Project Service Automation

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

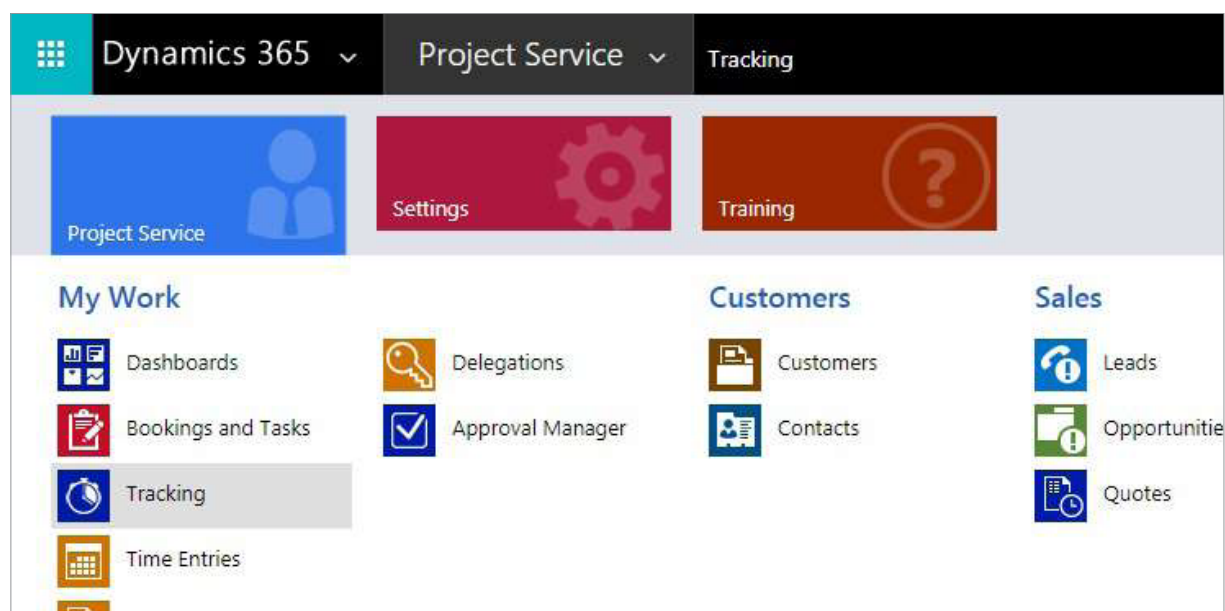


Manage Time Entries

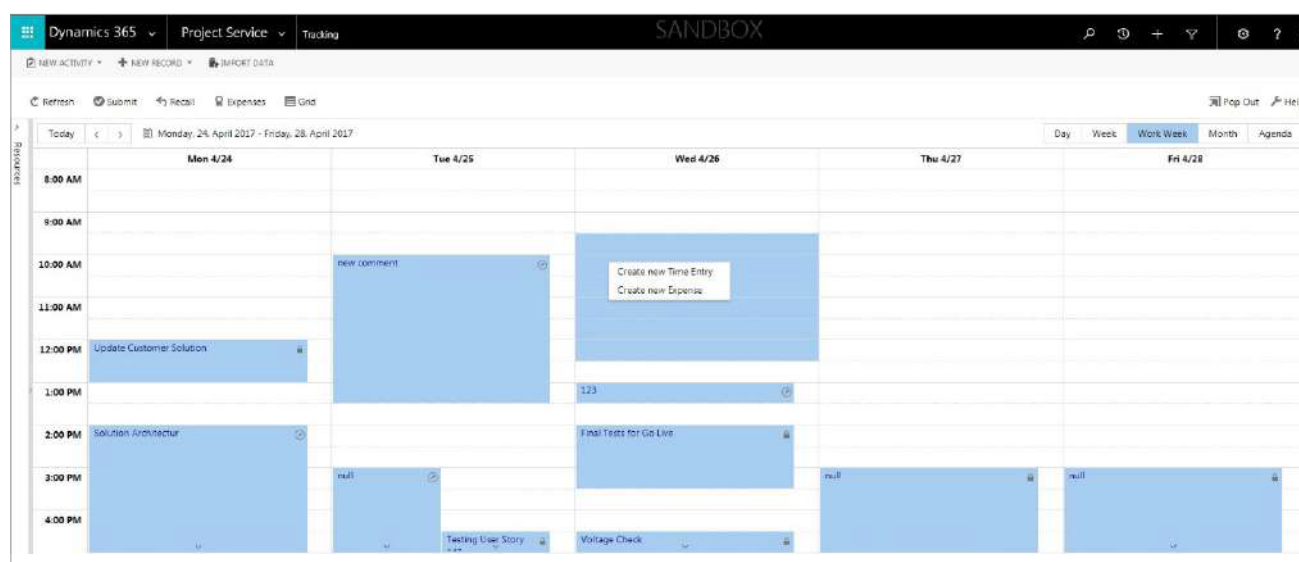
Each time entry requires a specific start and end time, its duration is calculated automatically and cannot be edited.

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**.





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page

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 Date4/26/2017 9:30 AM

Due Date4/26/2017 12:30 PM

External Comments

TypeWork

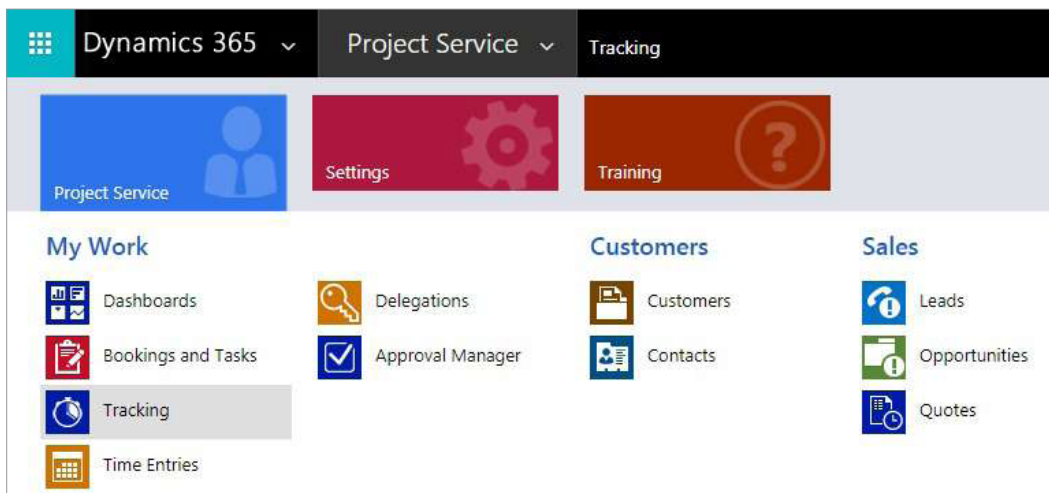
Role

SaveCancel

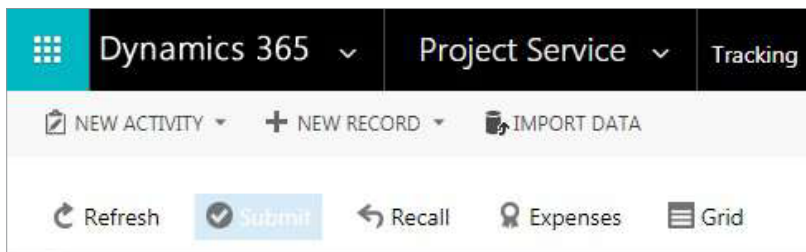


Submit a Time Entry

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**.



Dynamics 365

Project Service

Tracking

NEW ACTIVITY

NEW RECORD

IMPORT DATA

Refresh

Submit

Recall

Expenses

Grid

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.

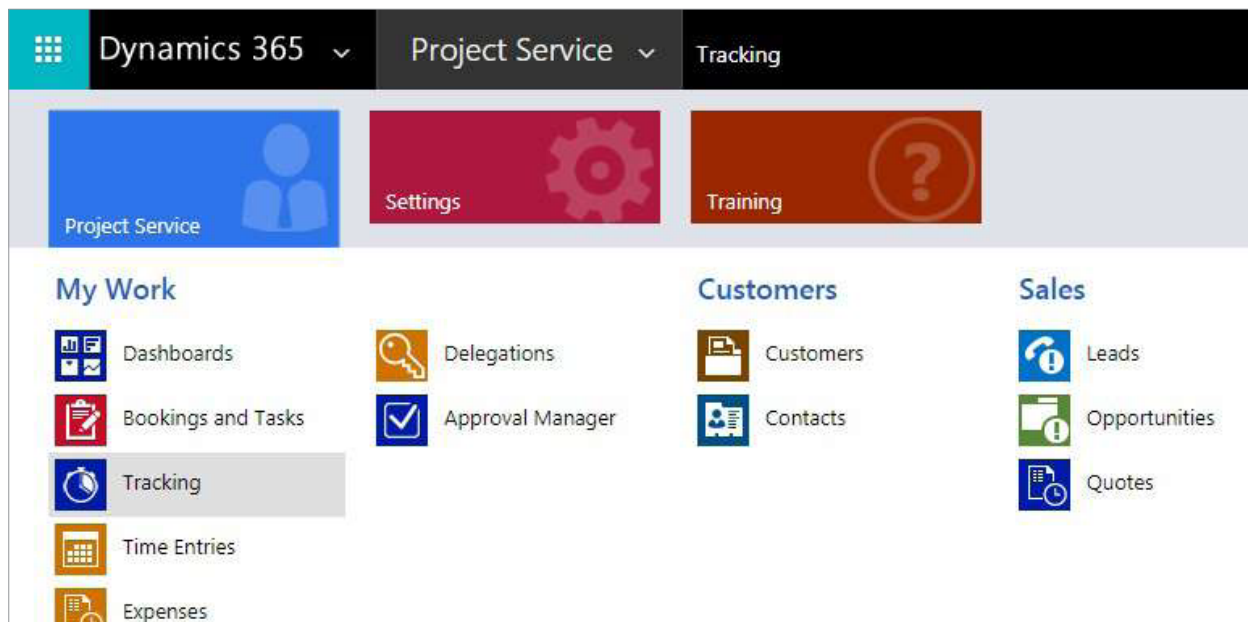
Recall Records						
Time Entry		Expense				
Start Date	Due Date	Duration	Type	Internal Comments	Project Task	Entry Status
4/25/2017	4/25/2017	3	Work	Voltage Check	Electrical fitting	Submitted
4/25/2017	4/25/2017	1.5	Work	Final Tests for Go Live	Go live readiness assessment	Submitted

Expenses

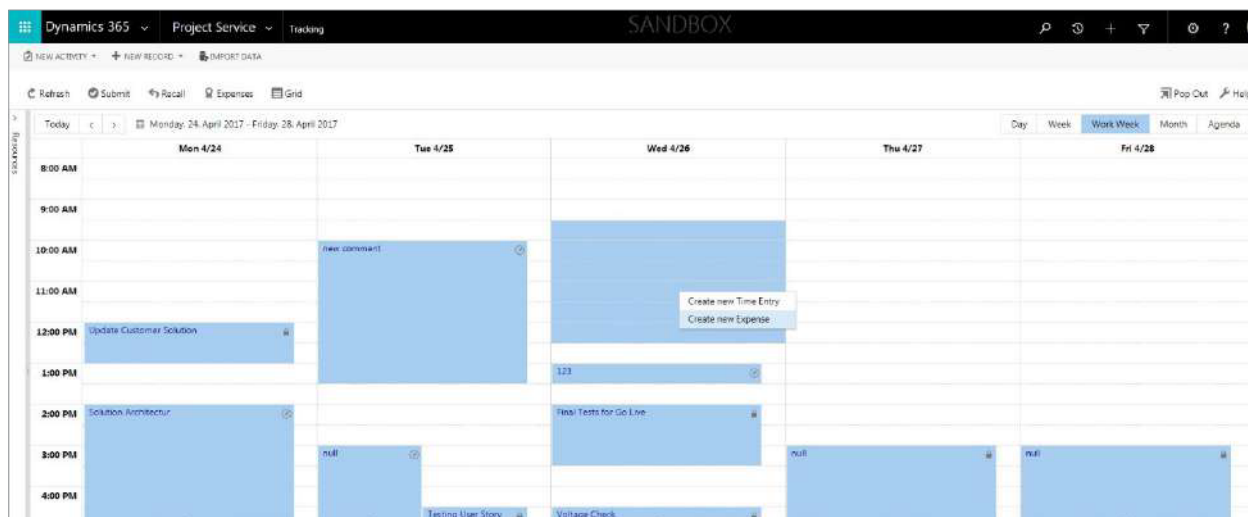
In addition to working time, you may also track project-related expenses. The following expense categories are available: Airfare, Car Rental, Hotel, Meal, Miscellaneous, Public Transportation and Taxi.

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**.

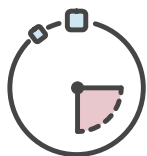
The screenshot shows the 'Expense' form in Dynamics 365. On the left, there is a project tree with a search bar and expand/collapse icons. The tree lists several project tasks, with 'John Adam' selected under 'Fitting and Commissioning on c...'. On the right, the form fields are: 'Expense Purpose' (empty), 'Transaction Date' (4/26/2017), 'Amount' (0.00), 'External Comments' (empty), and 'Expense Category' (Airfare). At the bottom right, there are 'Save' and 'Cancel' buttons.

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

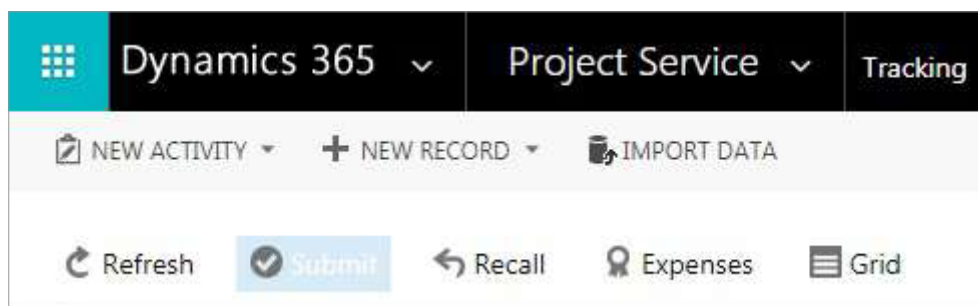
Submit an Expense

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

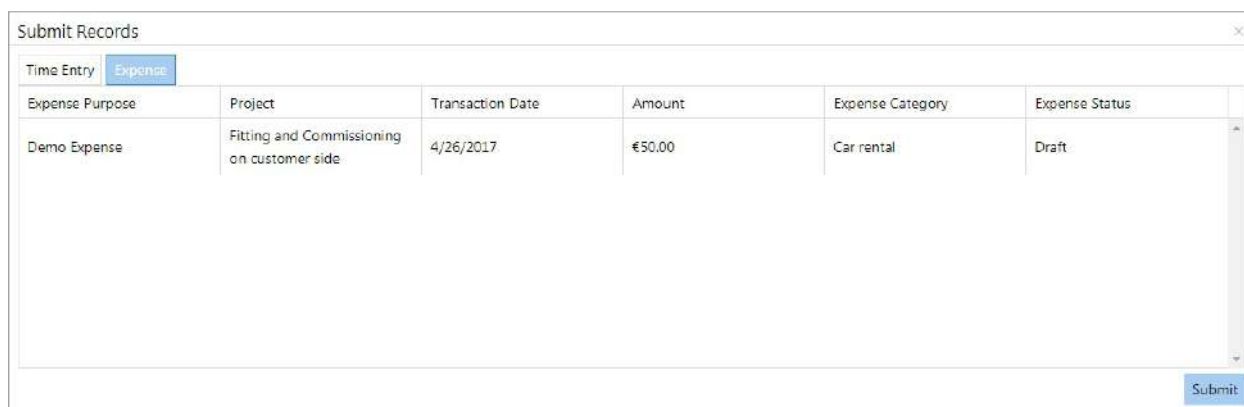
The screenshot shows the Dynamics 365 Project Service Tracking page. The top navigation bar includes 'Dynamics 365', 'Project Service', and 'Tracking'. Below the navigation bar, there are three main sections: 'Project Service' (with a person icon), 'Settings' (with a gear icon), and 'Training' (with a question mark icon). The main content area is divided into four columns: 'My Work', 'Customers', 'Sales', and 'Leads'. The 'My Work' column contains 'Dashboards', 'Bookings and Tasks', 'Tracking' (highlighted), 'Time Entries', 'Expenses', and 'Project Approvals'. The 'Customers' column contains 'Delegations', 'Approval Manager', 'Customers', and 'Contacts'. The 'Sales' column contains 'Leads', 'Opportunities', and 'Quotes'.



2. Click **Submit**.



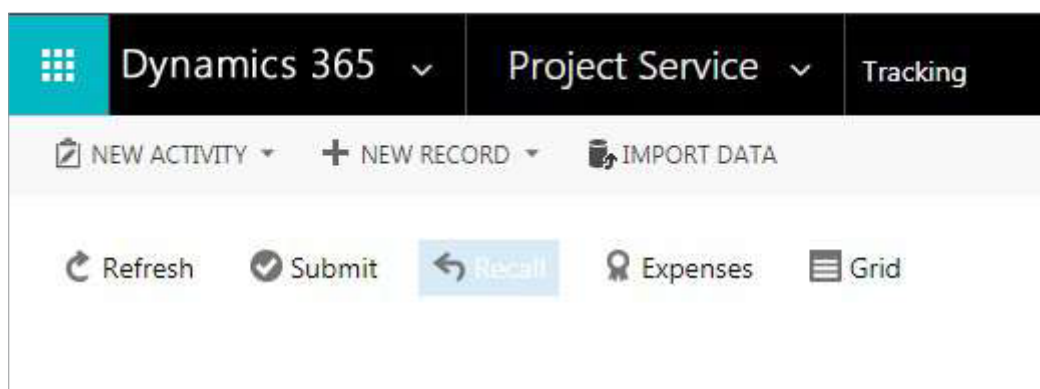
3. Switch to the **Expense** tab. In the list of draft expenses, select those you wish to submit via click. You may select multiple expenses at once by holding the CTRL key. Click **Submit** at the bottom right corner.

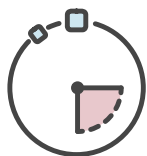


The status of the selected expenses will change from 'draft' to 'submitted'. These entries can no longer be edited (the status icon will change from a pen to a lock).

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**.





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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

Contact

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

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