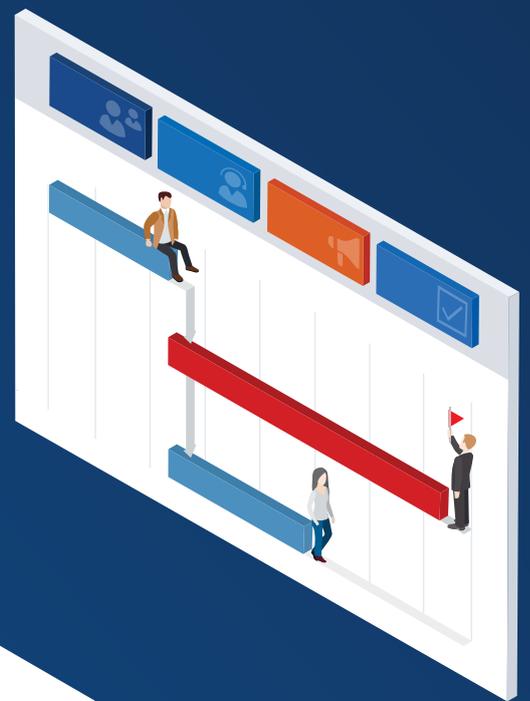


Project Gantt for Dynamics 365 Project Service Automation

User Guide



Project Gantt
for Dynamics 365
Project Service Automation

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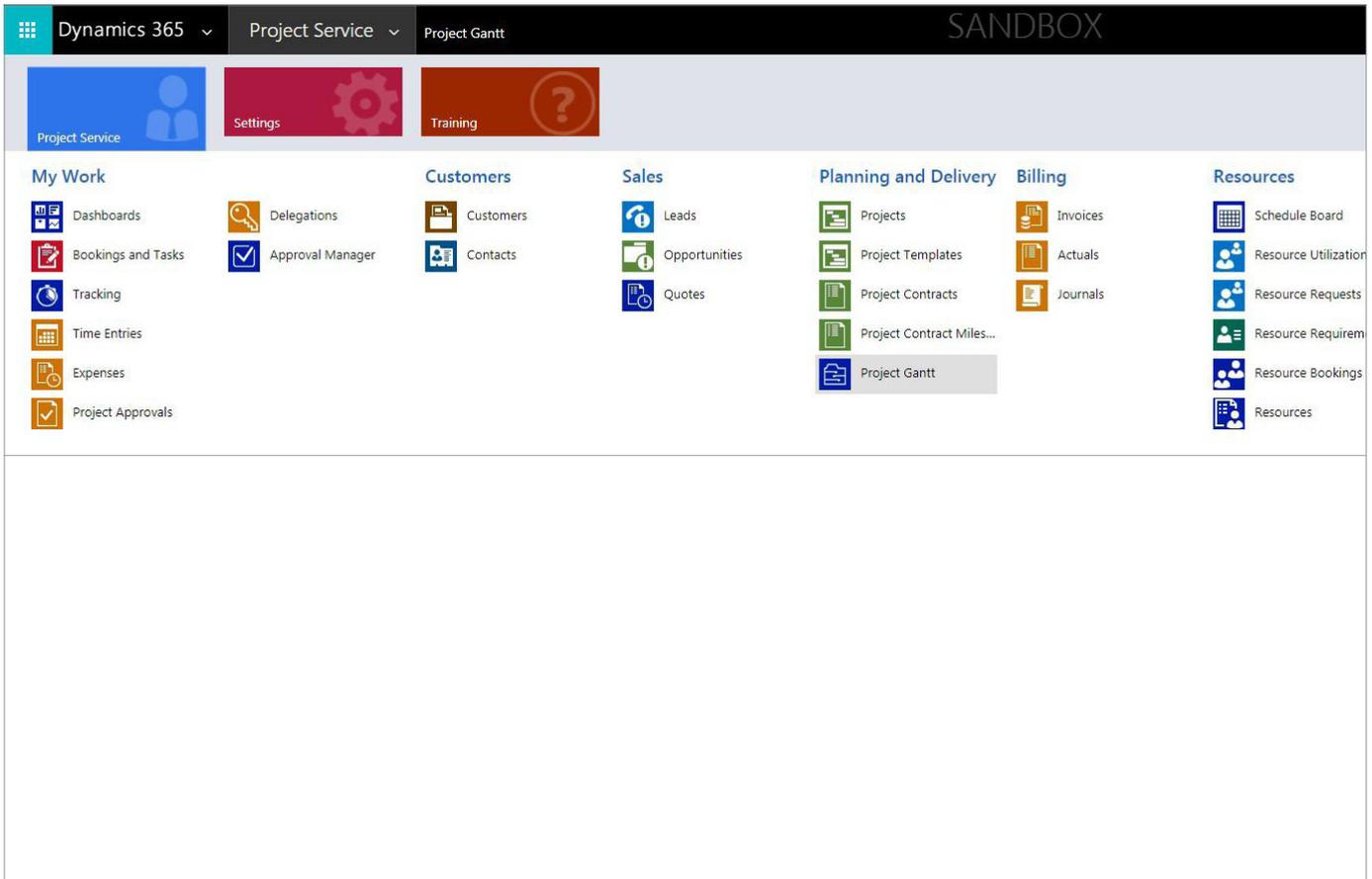


Project Gantt for Dynamics 365 Project Service Automation

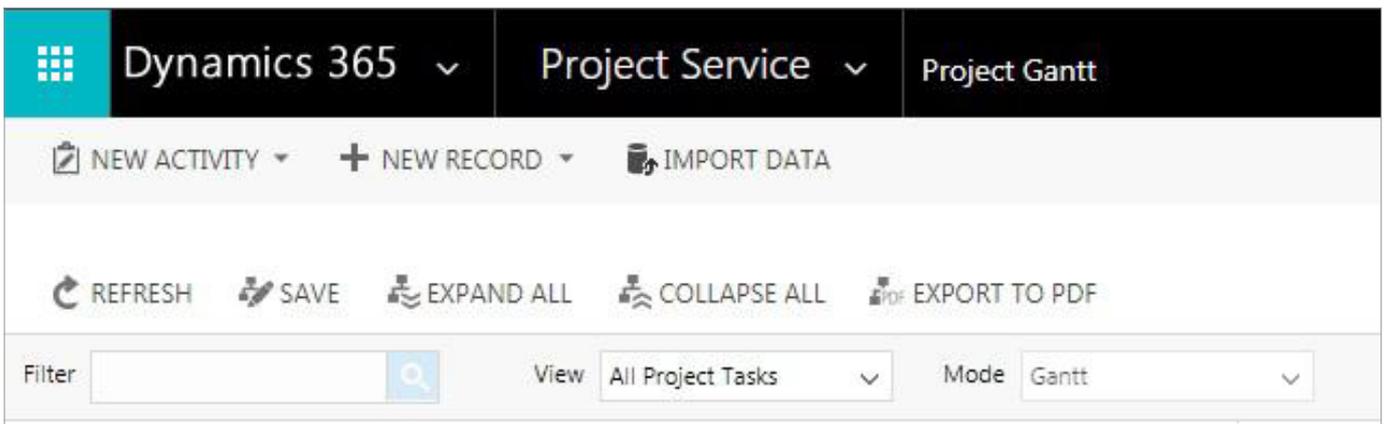
Project Gantt for Dynamics 365 Project Service Automation is an add-on which extends the Dynamics 365 Project Service Automation app. It allows project managers to plan and control project structures and progress. Project Gantt supports all Dynamics 365 Project Service Automation entities.

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:

Look in:

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
Excellence Health Services	405 325 7700	Reston

1 - 23 (0 selected) Page 1

Selected records: (0) [Invert selection](#)

4. Click **Refresh**.

Dynamics 365 Project Service Project Gantt

NEW ACTIVITY + NEW RECORD IMPORT DATA

REFRESH SAVE EXPAND ALL COLLAPSE ALL EXPORT TO PDF

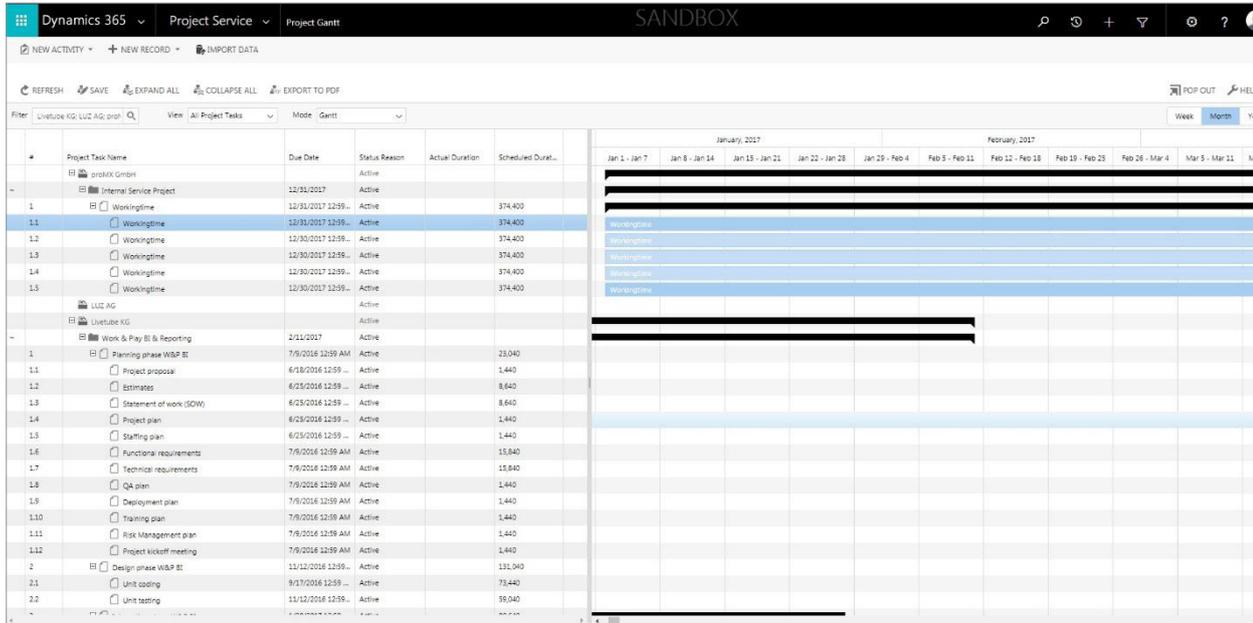
Filter: Livetube KG; LUZ AG; proli View: All Project Tasks Mode: Gantt



Project Gantt

for Dynamics 365
Project Service Automation

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 Gantt interface. 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 secondary bar contains 'REFRESH', 'SAVE', 'EXPAND ALL', 'COLLAPSE ALL', and 'EXPORT TO PDF'. The main area has a filter 'Livetube KG; LUZ AG; proh' and a view mode set to 'All Project Tasks' in 'Gantt' mode. A table lists project tasks with columns for '#', 'Project Task Name', 'Due Date', 'Status Reason', 'Actual Duration', and 'Scheduled Durat...'. One task is highlighted, and a context menu is open with options 'Open in CRM' and 'Add new project'.

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 with the following fields and values:

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

Buttons for 'OK' and 'Cancel' are located at the bottom right of the dialog.



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**.

The screenshot shows the Dynamics 365 Project Gantt interface. 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 secondary bar contains 'REFRESH', 'SAVE', 'EXPAND ALL', 'COLLAPSE ALL', and 'EXPORT TO PDF'. The main area has a filter 'Livetube KG; LUZ AG; proh', a view dropdown set to 'All Project Tasks', and a mode dropdown set to 'Gantt'. The table below has columns for '#', 'Project Task Name', 'Due Date', 'Status Reason', 'Actual Duration', and 'Scheduled Durat...'. The 'Internal Service Project' row is selected, and a context menu is open over it, with 'Add child task' highlighted.

#	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**.

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

- Is Milestone
- Project Task Name:
- Start Date: (calendar icon)
- Parent: (search icon)
- Due Date: (calendar icon)
- Role: (search icon)
- Estimated Effort: (up/down arrows)

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



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

The screenshot shows the Project Gantt interface. At the top, there are navigation buttons: REFRESH, SAVE, EXPAND ALL, COLLAPSE ALL, EXPORT TO PDF, POP OUT, and HELP. Below these are filter and view options: Filter: Live/Hide KB, LUIZ, AIG, prof; View: All Project Tasks; Mode: Gantt. The main area is a Gantt chart for November and December 2016. A table of tasks is visible on the left, with the following data:

#	Project Task Name	Due Date	Status Reason	Actual Duration	Scheduled Duration
1.1	☐ Training phase W&P BI				
1.1	☐ Project proposal	8/28/2016 12:59 ...	Active	1,440	1,440
1.2	☐ Estimates	8/29/2016 12:59 ...	Active	8,640	8,640
1.3	☐ Statement of work (SOW)	8/29/2016 12:59 ...	Active	8,640	8,640
1.4	☐ Project plan	8/29/2016 12:59 ...	Active	1,440	1,440
1.5	☐ Staffing plan	8/29/2016 12:59 ...	Active	1,440	1,440
1.6	☐ Functional requirements	7/9/2016 12:59 AM	Active	15,840	15,840
1.7	☐ Technical requirements	7/9/2016 12:59 AM	Active	15,840	15,840
1.8	☐ QA plan	7/9/2016 12:59 AM	Active	1,440	1,440
1.9	☐ Deployment plan	7/9/2016 12:59 AM	Active	1,440	1,440
1.10	☐ Training plan	7/9/2016 12:59 AM	Active	1,440	1,440
1.11	☐ Risk Management plan	7/9/2016 12:59 AM	Active	1,440	1,440
1.12	☐ Project kickoff meeting	7/9/2016 12:59 AM	Active	1,440	1,440
2	☑ Design phase W&P BI	11/12/2016 12:59 ...	Active	131,040	131,040
2.1	☐ Unit coding	9/17/2016 12:59 ...	Active	73,440	73,440
2.2	☐ Unit testing	11/12/2016 12:59 ...	Active	59,040	59,040
3	☑ Integration phase W&P BI	1/28/2017 12:59 ...	Active	80,640	80,640
3.1	☐ Integration testing	1/28/2017 12:59 ...	Active	80,640	80,640
3.2	☑ QA risk assessment	11/19/2016 12:59 ...	Active	8,640	8,640
3.3	☐ Training manual	11/19/2016 12:59 ...	Active	8,640	8,640
4	☑ Deployment phase W&P BI	2/11/2017 12:59 ...	Active	55,040	55,040
4.1	☐ System training	11/19/2016 12:59 ...	Active	8,640	8,640
4.2	☐ Go live readiness assessment	2/4/2017 12:59 AM	Active	8,640	8,640
4.3	☐ Deployment	2/11/2017 12:59 ...	Active	8,640	8,640
4.4	☐ Client acceptance	2/11/2017 12:59 ...	Active	1,440	1,440
5	☑ Post-deployment phase W&P BI	2/11/2017 12:59 ...	Active	1,440	1,440
5.1	☐ Project closure report	2/11/2017 12:59 ...	Active	1,440	1,440
5.2	☐ Project completion agreement	2/11/2017 12:59 ...	Active	1,440	1,440

The context menu for the 'QA risk assessment' task (row 3.2) is open, showing options: Integration Meeting, QA risk assessment, Open in CRM, Edit, Set Status Reason, Project Task, Resources (highlighted), and Delete.

4. Choose **New**.

The 'Manage resources' dialog box is shown. The 'Task' field contains 'QA risk assessment'. Below the task field is a table with two columns: 'Bookable Resource' and 'Hours'. The table is currently empty. At the bottom of the dialog, there are five buttons: 'New', 'Edit', 'Delete', 'Restore', and 'Close'.



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 magnifying glass icon]
- Hours: 20
- From Date: 11/11/2016
- To Date: 11/19/2016

Buttons: OK, Cancel

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

The 'Look Up Records' dialog box is used to search for resources. It includes the following elements:

- Look for: Bookable Resource
- Look in: Active Bookable Resources
- Search: [Empty field with magnifying glass icon]
- Table with columns: Name, Resource Type, Organizational Unit

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

1 - 25 (0 selected) Page 1

Selected records: (0) [Invert selection](#)

Buttons: Select, Remove, Add, Cancel



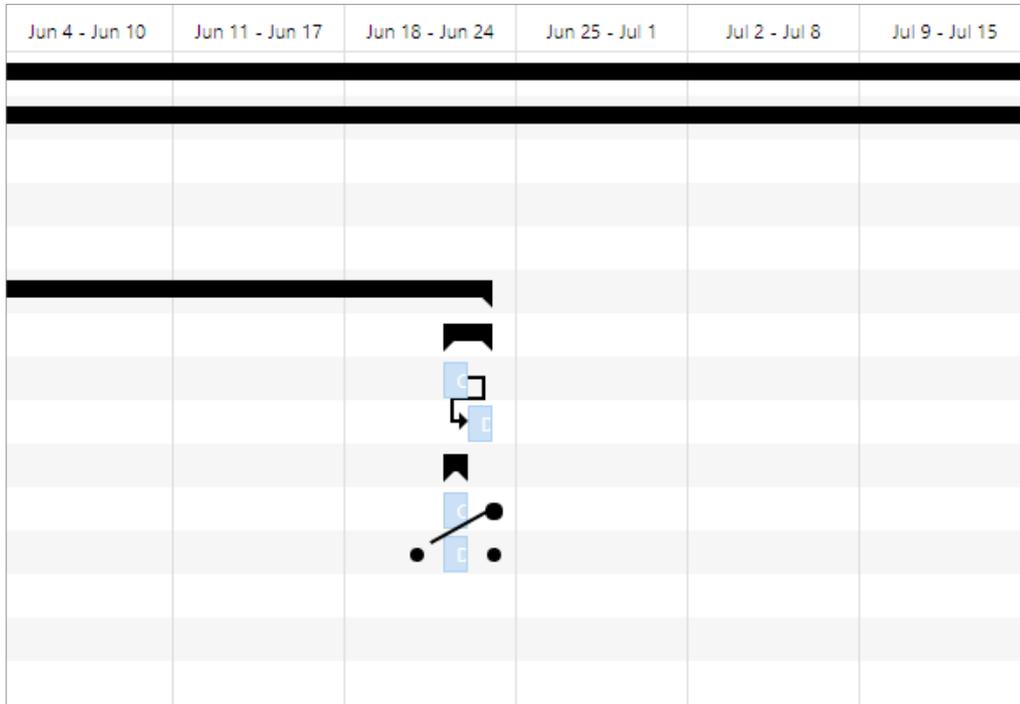
7. In the Assign resource window, click **OK**.

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

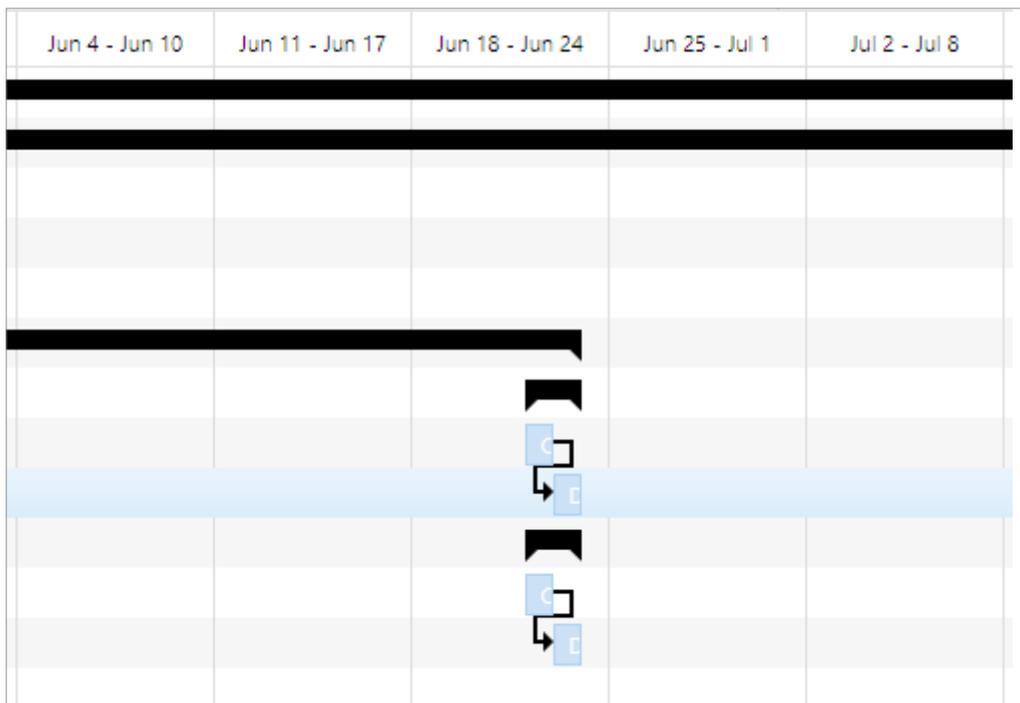
Integration testing	
QA risk assessment	Erika Meyer
Training manual	



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.

Contact

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