Project Gantt for Dynamics 365

Project Service Automation

User Guide

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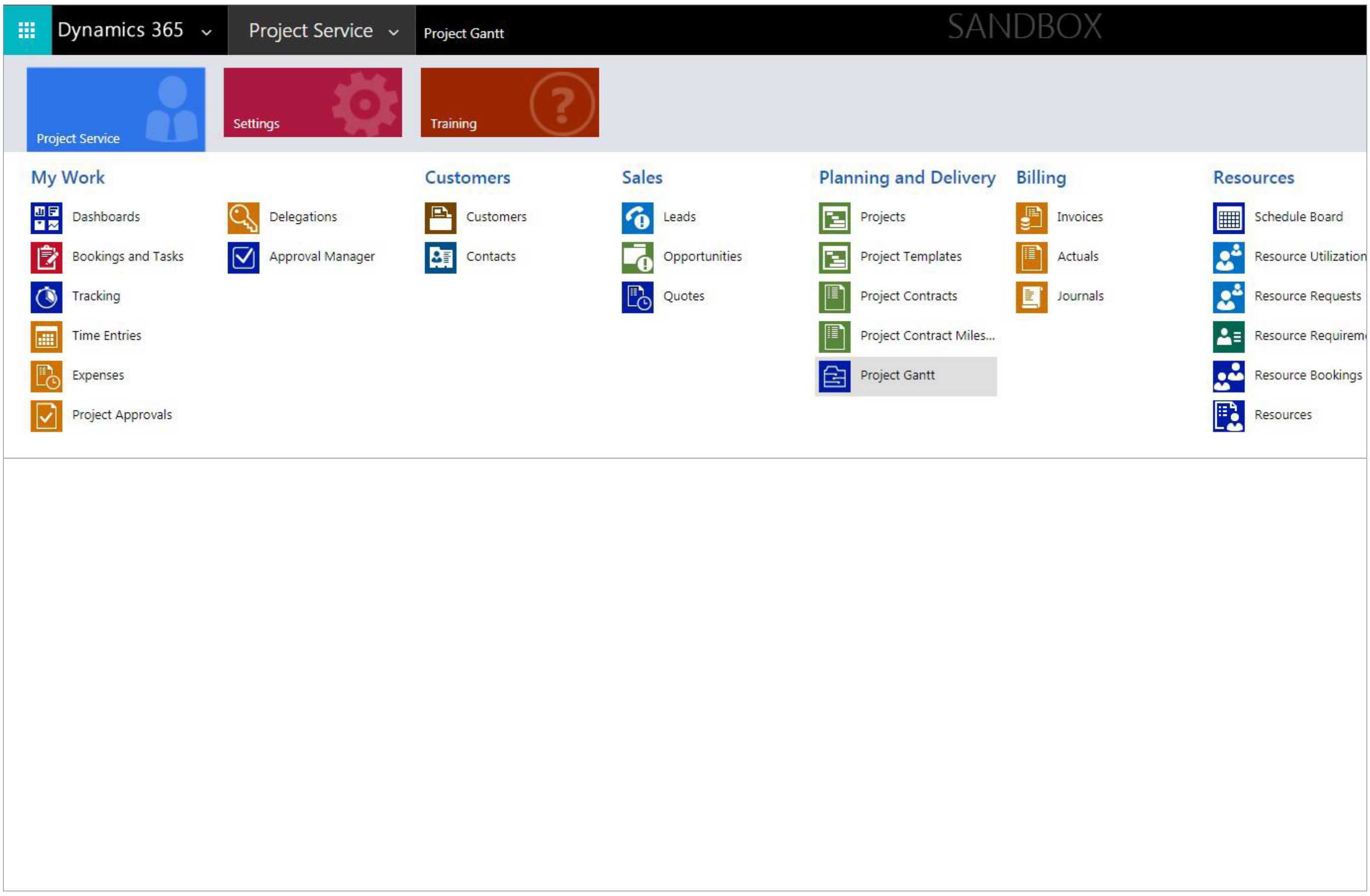
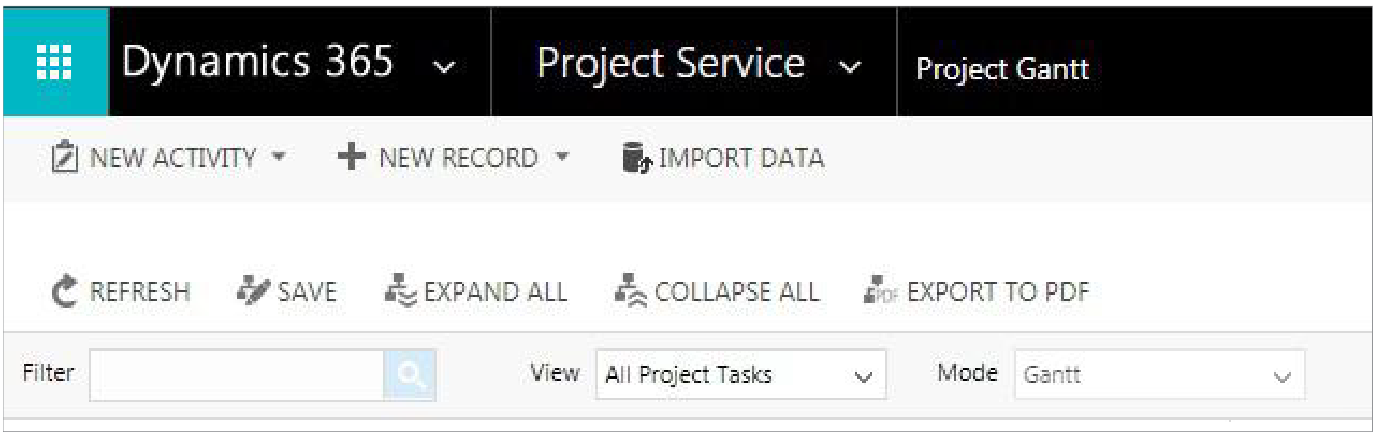
Project Gantt for Dynamics 365 Project Service Automation is an add-on which extends the Dynamics 365 Project Service Automation app. It allows project managers to plan and control project structures and progress. Project Gantt supports all Dynamics 365 Project Service Automation entities.

Display projects

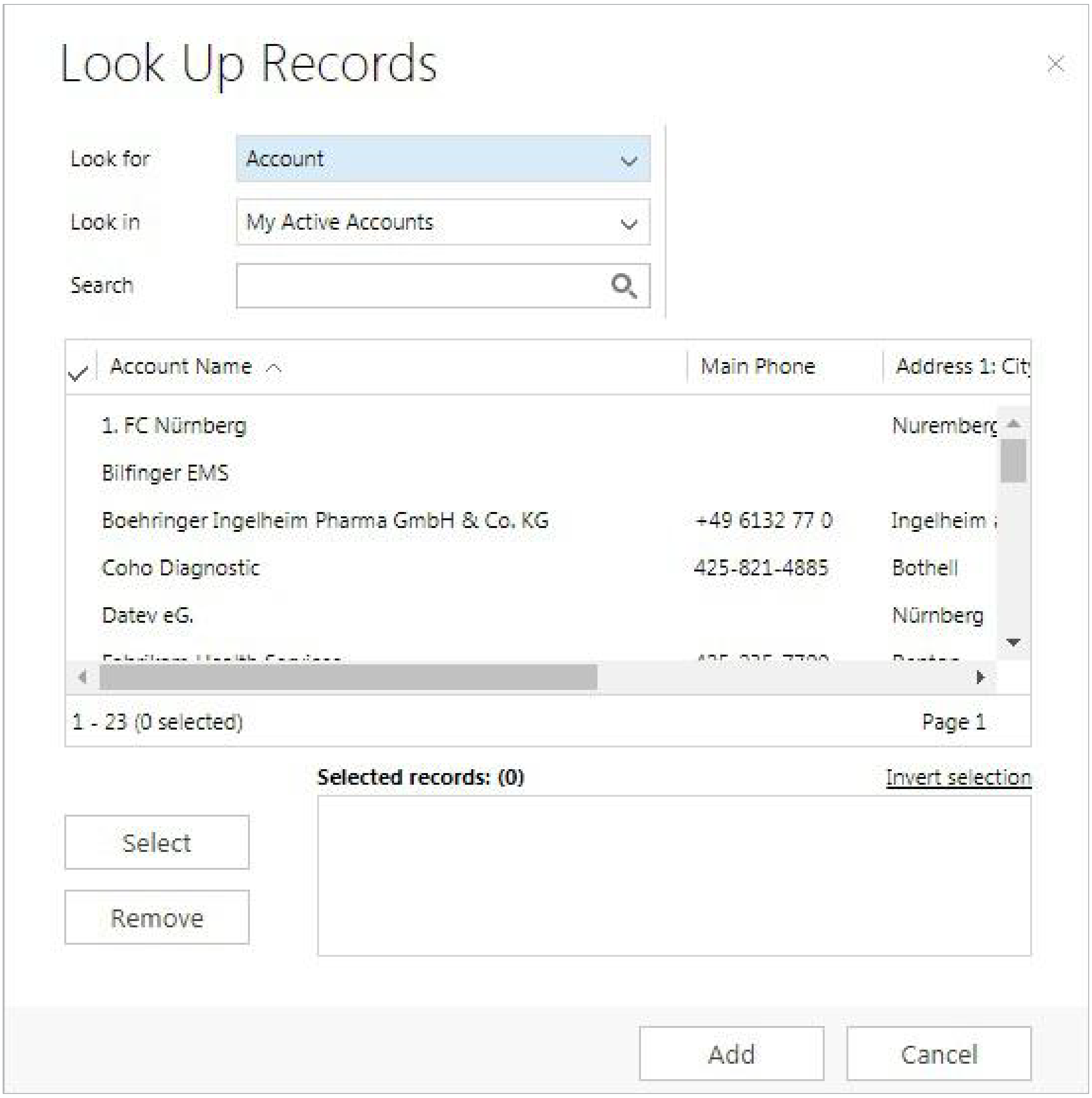
1. Go to **Project Service > Project Gantt.**



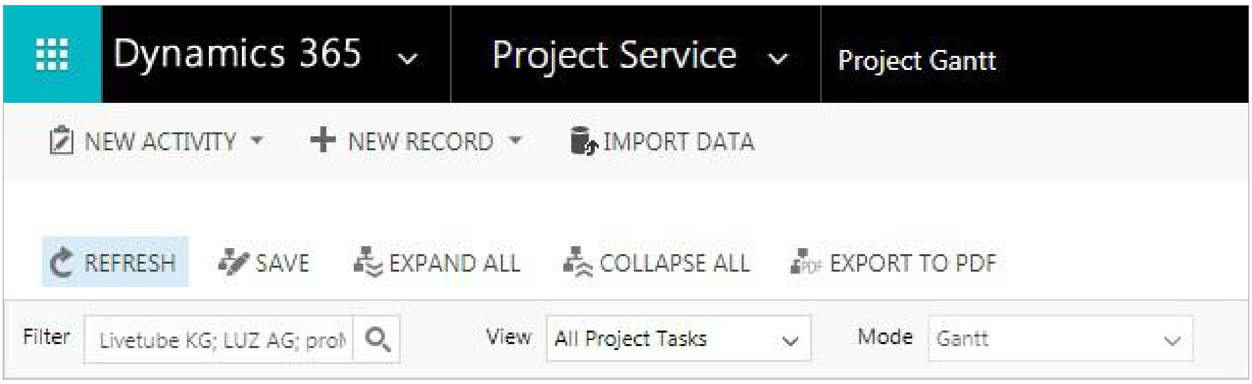
2. To display all projects, click **Refresh**. To select particular projects to display, click the magnifying glass icon in the field **Filter.**



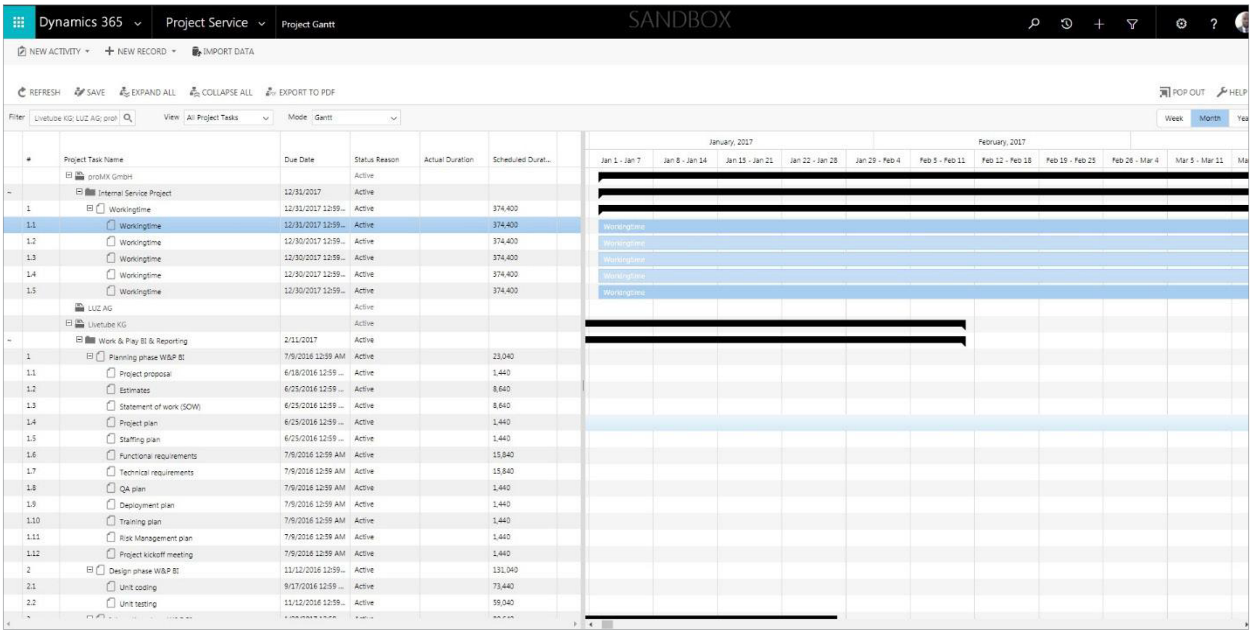
3. Browse Projects, Accounts, Contacts, and Project Tasks and **Select** the records you would like to display. Then, click **Add.**



4. Click **Refresh**.

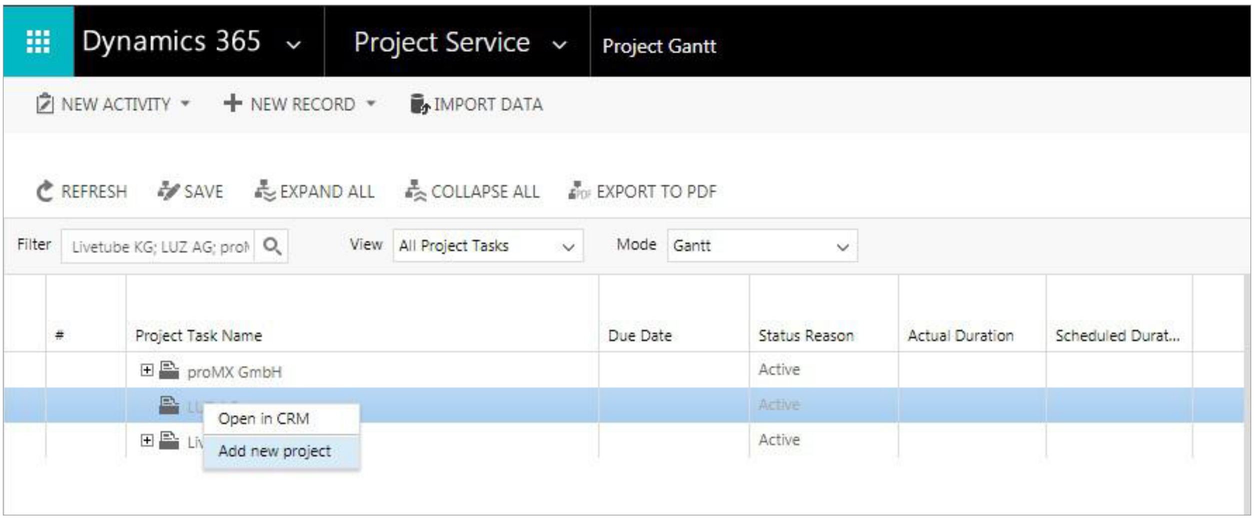


The selected records will appear in the project tree hierarchy on the left and as Gantt charts on the right.

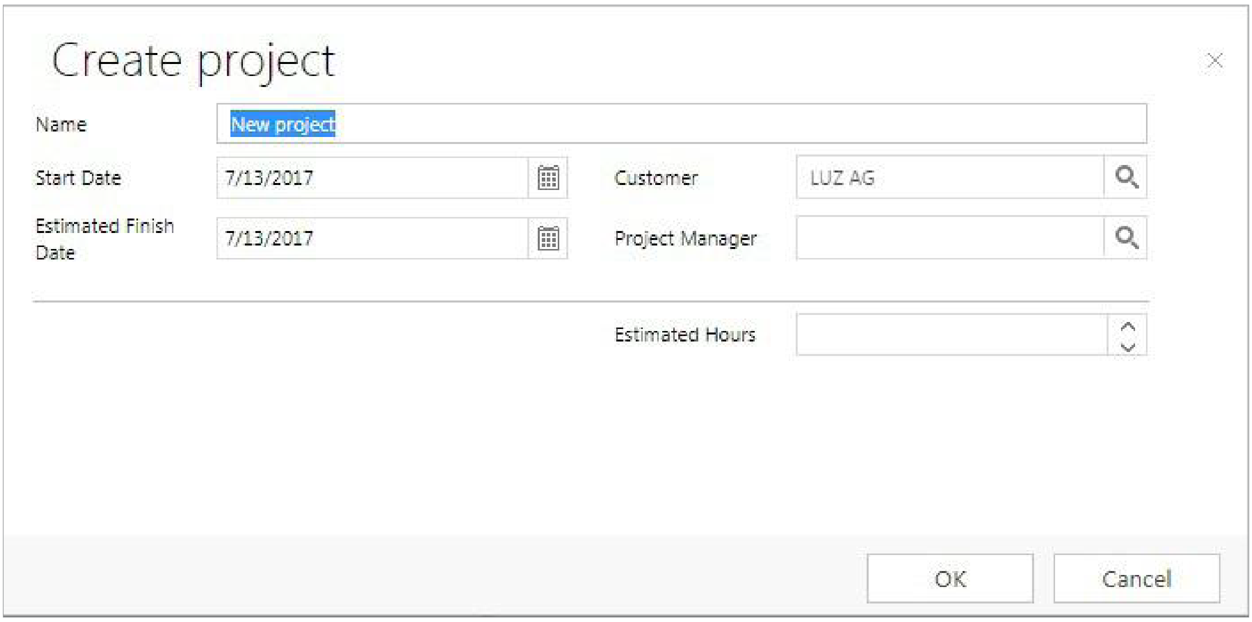


Add a new project

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

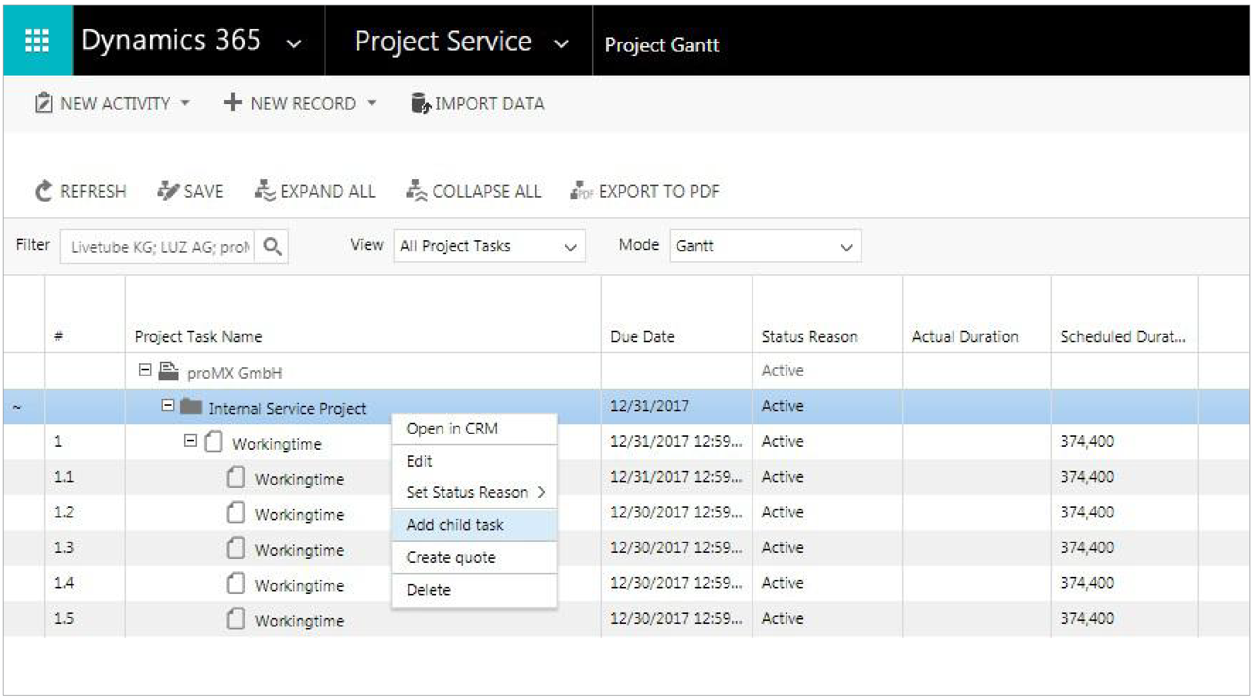


2. Fill in the form. Choose **OK** to schedule your project for creation. To create the project, subsequently click **Save** in the command bar.

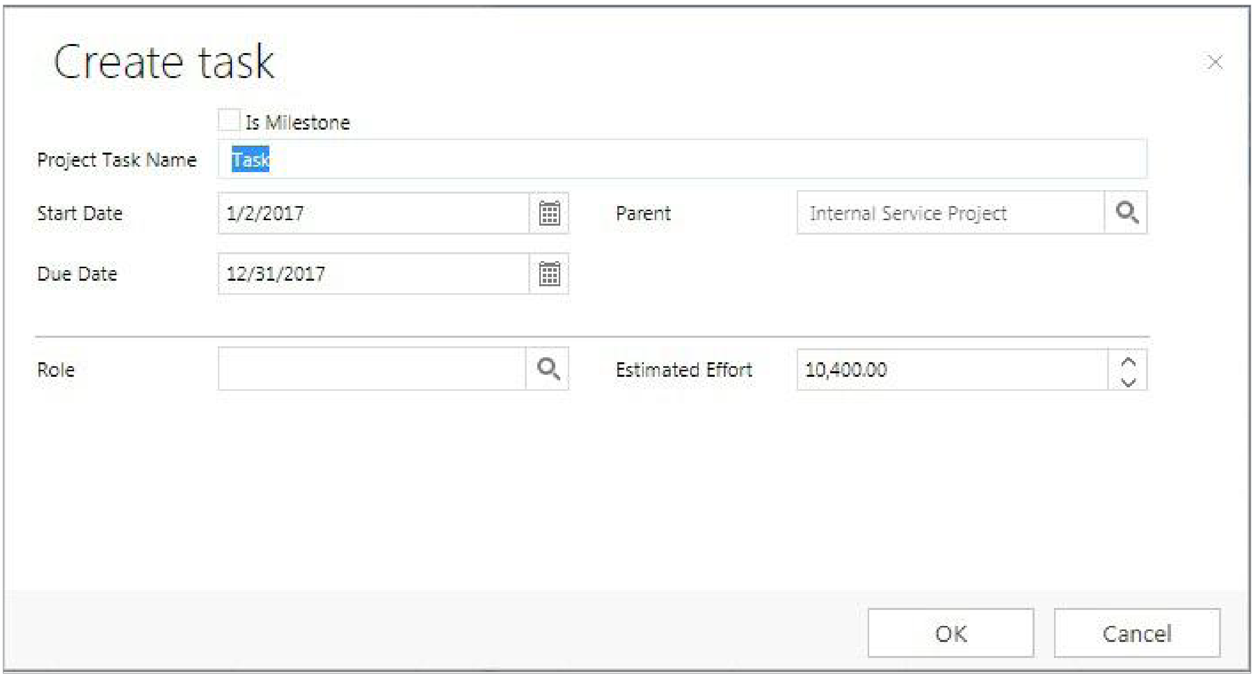


Manage project tasks

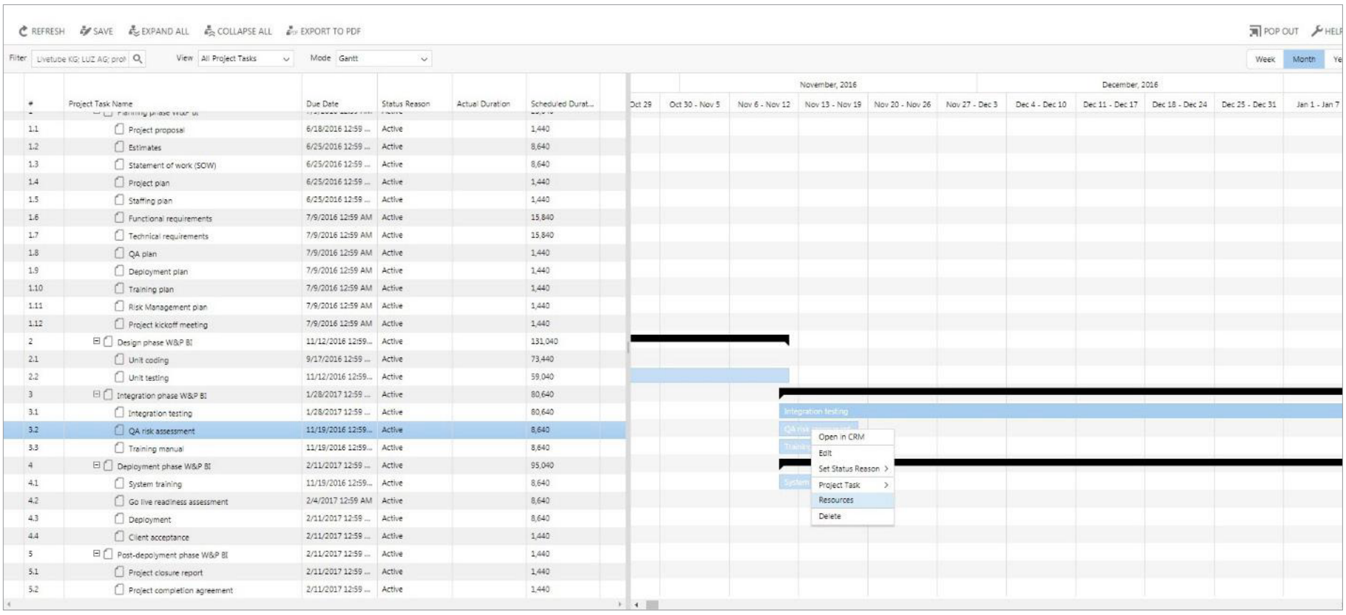
1. To create a new project task, select a project and right click to open the context menu. Select **Add child task**.



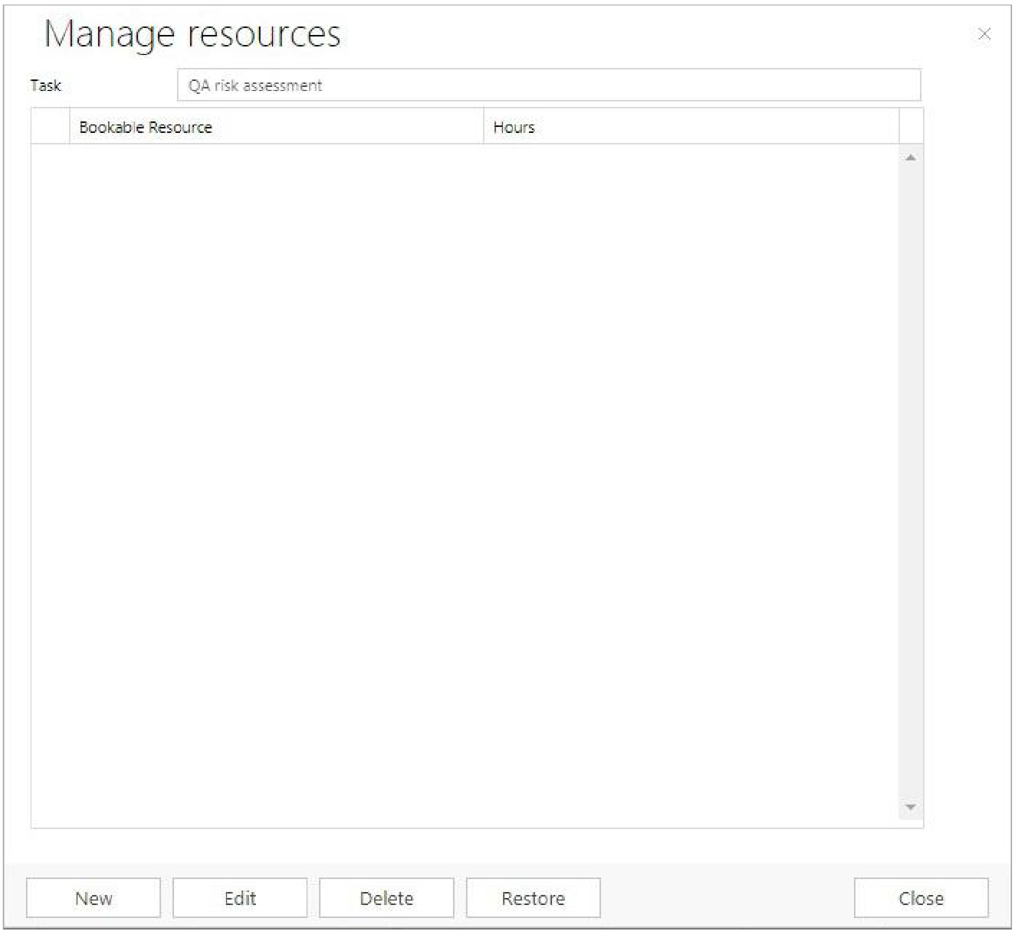
2. In the dialog window, fill in all fields and click **OK**.



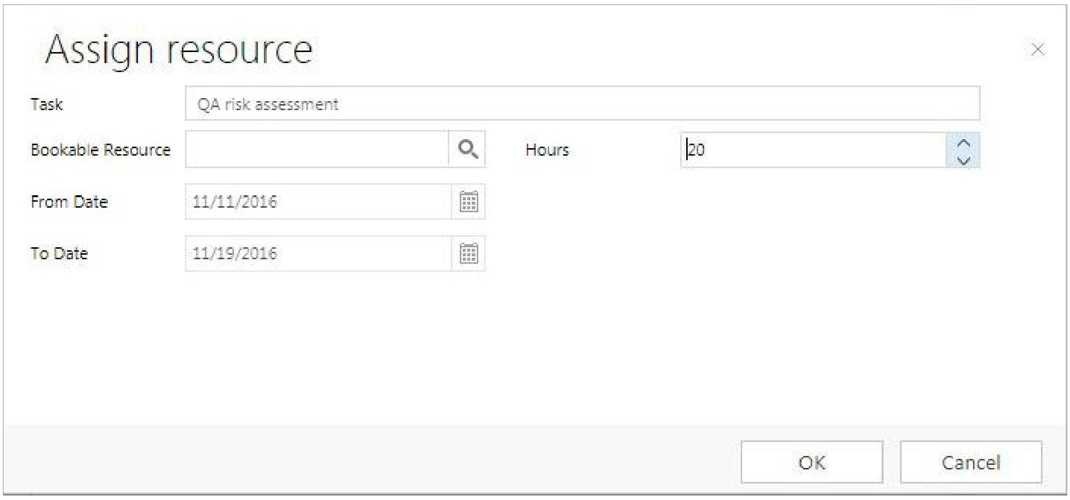
3. To assign a resource to a task, select the project task and right click to open the context menu. Select **Resources**.



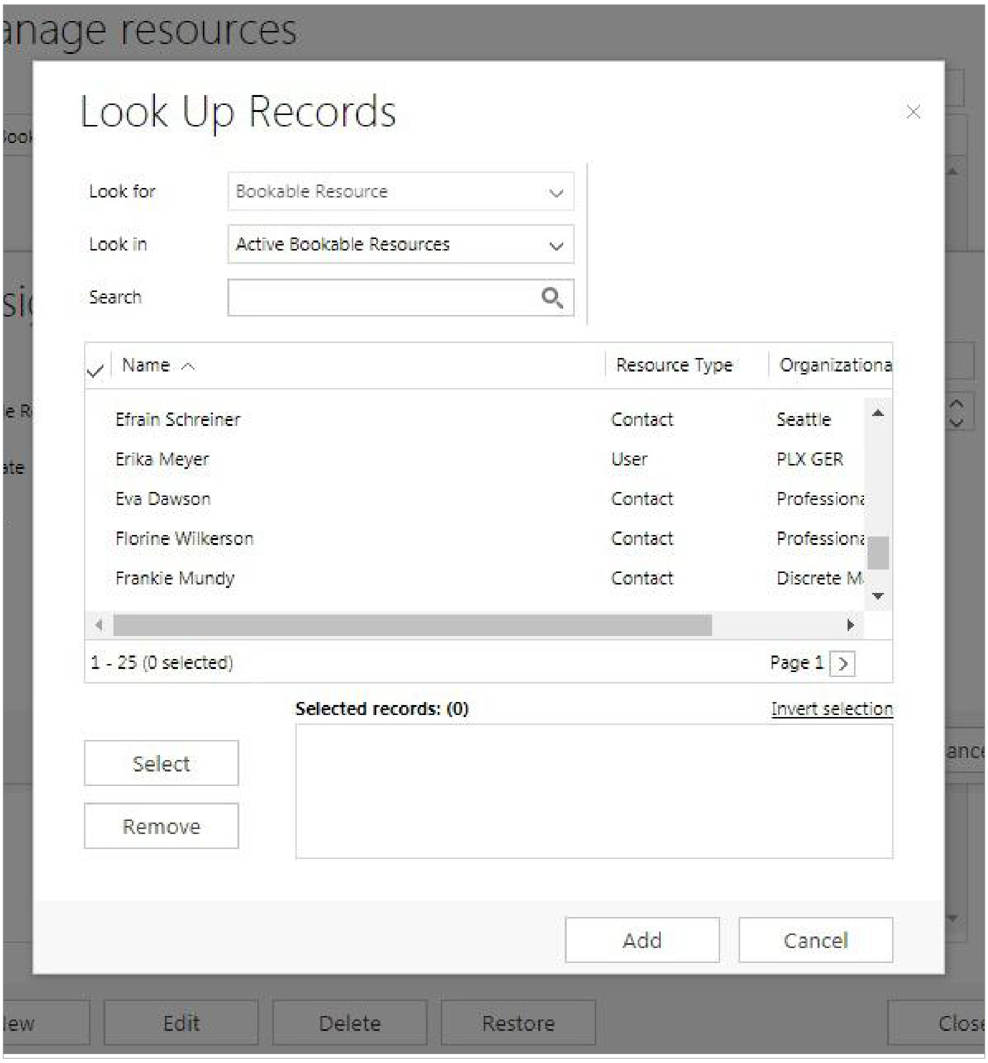
4. Choose **New**.



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

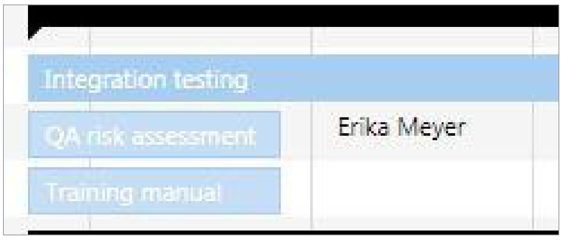


6. Select one or more resoures and click **Select** and then **Add**.



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

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

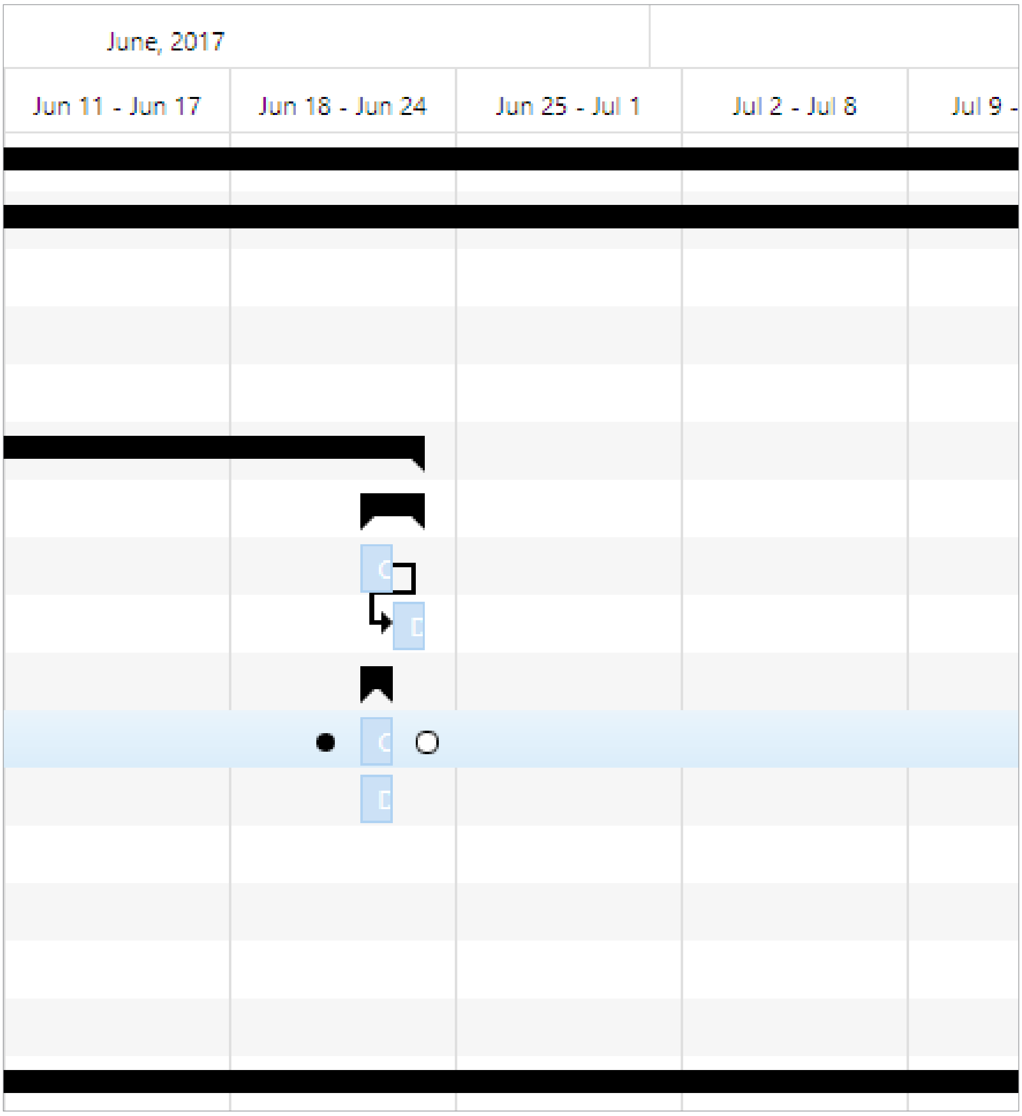


Create a project task dependency

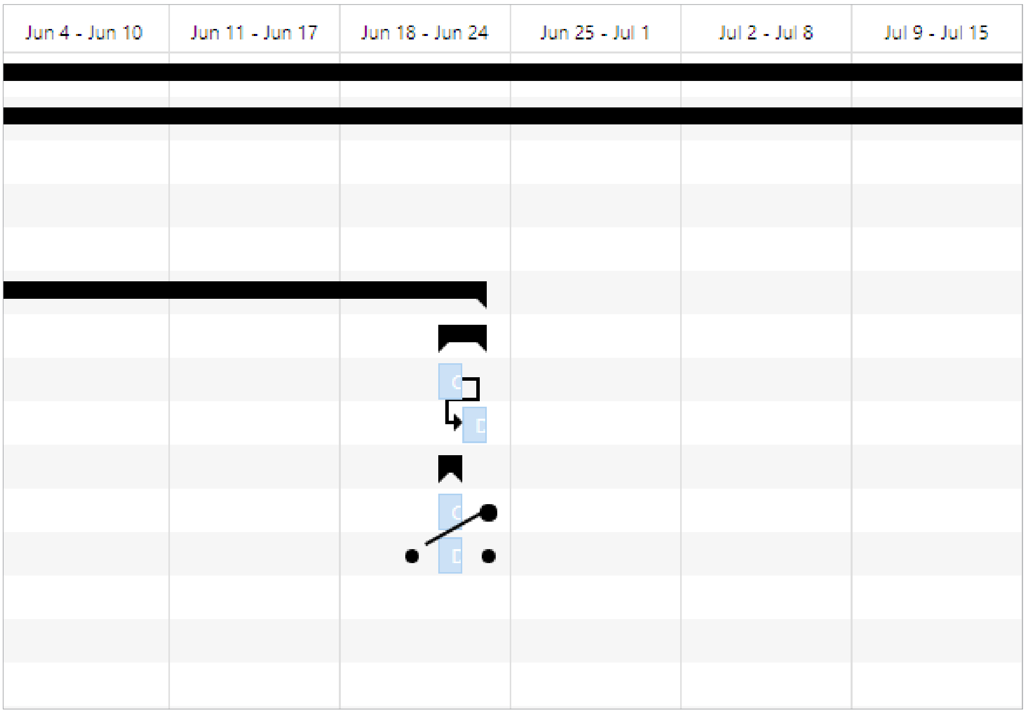
There are four possible dependencies between project tasks: Finish-to-Start (FS), Finish-to-Finish (FF), Start-to-Start (SS), and Start-to-Finish (SF).

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

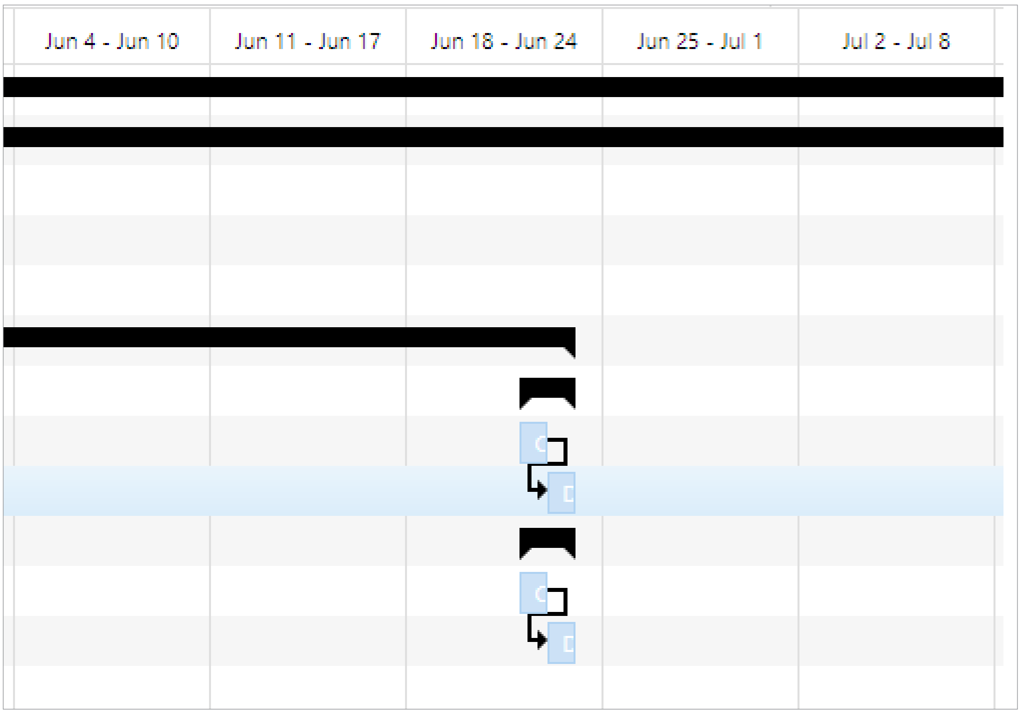
Place your cursor on one of the project tasks. Two circles appear, the circle to the left of the chart represents the start of the project task, the circle on the right the end.



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.

Contact

For questions, wishes or feedback, please contact us via
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